



Jacqueline T. Kelly

Attorney



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Biography

Jacque Kelly is a disciplined and thoughtful lawyer, who understands the emotions and complexity of estate tax planning and the unique issues that arise for owners of closely-held businesses with respect to succession planning. Jacque advises clients on a broad range of U.S. federal income, gift and estate tax matters. Prior to attending law school, Jacque worked in public accounting as a CPA in the Private Company Services group at PWC in Dallas.

Education

- J.D., The University of Texas at Austin, 2019
- Master in Professional Accounting, McCombs School of Business, The University of Texas at Austin, 2013
- B.S., Business Administration, Rockhurst University, 2012

Admissions

- State Bar of Texas

Practice Areas

- Tax
- Estate Planning

Representative Work

- Draft private company trust structure for high-net worth family

- Draft spousal lifetime access trust with separate trusts for surviving children and grandchildren to protect assets and minimize estate tax
- Draft memorandum related to client's United States residency and domiciliary status
- Research and review U.S. tax treatment of liquidation of foreign operating company

Affiliations

- Dallas Bar Association, Tax Section member
- Certified Public Accountant (Texas)