McWilliams, Jr., Charles E.

Chuck joined WCL&W in 2012 after working in a boutique tax, trust, estates and business planning practice in Winchester since 2007. He is both a lawyer and a Certified Public Accountant and worked in public accounting before attending law school. Chuck's practice focuses on complex estate planning and administration matters, resolving tax disputes, business planning, choice of entity, and other general business matters. In addition to his law practice, Chuck serves on the Board of Directors for the Rotary Club of Winchester's Latest, teaches skiing, and conducts educational courses for accounting firms, banks, investment companies, and their clients. His trust and estates practice focuses primarily on business owners, individuals and families with more than $1 million in liquid assets, and he regularly works to resolve family disputes, establish business succession plans and protect spendthrift beneficiaries.

Representative Experience

Due to the highly confidential nature of Chuck's work, specific examples and clientele cannot be provided, but representative projects include the following:

- Negotiation and payment plans, settlements and offers in compromise related to federal, state and local taxes, including income, withholding and sales/use taxes.
- Preparation of Private Letter Rulings – see PLR 2010-41049, for example.
- Choice of entity matters, business mergers and long-term business planning.
- Preparation of complex estate plans. Planning typically involves the use of revocable inter vivos trusts, medical directives, powers of attorney, gifting programs and often irrevocable trusts, charitable foundations, family limited partnerships and various valuation discount strategies.
- Representation of trustees and executors in the estate administration process.
- Advising litigation counsel in estate litigation matters.
- Representation of taxpayers in audits.
- Preparation of estate tax returns (Form 706), inventories, accountings and other probate documentation.
- Non-judicial settlement agreements for trusts; negotiation of beneficiary/trustee disputes.
- Advising non-profits on governance matters.
- Advising landlords, business owners and real estate developers on a variety of issues including tax, business and employment matters.

Professional Recognition

- Named to "Legal Elite," Taxes/Estates/Trusts/Elder Law, *Virginia Business Magazine*, 2014
- AV rated by Martindale-Hubbell (highest rating)
- Named a 2017 "Rising Star" by *Super Lawyers Magazine* in Estate Planning & Probate

Practice Areas

Commercial Business Transactions

Estate Planning & Administration

Education

Georgetown University, LL.M in Taxation, 2015 with Honors/Distinction

George Mason University School of Law, J.D., 2007

George Mason University, B.S., Accounting, 2004

Hampden-Sydney College, B.A., Political Science, 2002

Professional Membership

Virginia Bar Association

Prince William County Bar Association

Frederick County Bar Association

Certified Public Accountant

American Institute of Certified Public Accountants

Rotary Club of Winchester's Latest, Director

Admitted to Practice in:

Virginia

West Virginia

District of Columbia

U.S. Tax Court