TUGGLE DUGGINS
ATTORNEYS AT LAW

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Bradley L. Jacobs

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Brad Jacobs helps provide his clients with peace of mind regarding the well-being of their businesses and families. Through estate and succession planning, he helps them prepare for the contingencies and challenges that may occur, while allowing the focus to remain on business and personal goals. His practice focuses on an array of estate planning matters, including

- estate tax,
- generational wealth transfer,
- life insurance,
- charitable donations, and
- business succession planning.

Brad also drafts wills and trusts and counsels clients on estate administration and elder law matters. He enjoys the challenges of creative problem solving and long-term planning and appreciates the vast and interesting array of clients and businesses that keeps his practice interesting. His goal is to always provide his clients with clear and thoughtful legal advice, and to put their needs and interests above all else.

Brad is a frequent writer and speaker on various topics relevant to CPAs, insurance providers, attorneys and law students, and other professionals at the North Carolina Bar Foundation, local colleges and universities, and other professional organizations. He has been recognized as an Outstanding Discussion Leader by the North Carolina Association of CPAs for courses he has written and presented, is a Certified Public Accountant in North Carolina, a North Carolina Bar Board Certified Specialist in Estate Planning and Probate Law and is recognized by Best Lawyers in America and Super Lawyers.

Recent Representative Matters

- Has assisted a family with diverse and substantial wealth with moving toward the transition to its next generation, which involved both helping the older generation reach decisions about the structure for business and family success as well as assisting the

SERVICES

Corporate & Finance

Tax

Estate Planning & Wealth Management

EDUCATION

J.D., University of Kentucky School of Law, with distinction (1986)

B.S., Indiana State University, magna cum laude (1983) younger generation to understand the new responsibilities.

- Has assisted several clients in the creation of charitable family organizations, allowing the senior generation to recognize lifetime charitable desires while also involving several generations to participate in moving toward a lasting charitable legacy.

Outside of the Office

Outside of the office, Brad enjoys staying active and spending time outside. He is a lifelong tennis player and enjoys running. He also spends time tending to his garden and landscaping, further allowing him to enjoy the outdoors. Brad also enjoys live music, movies and spending quality time with his family.

Awards

Martindale-Hubbell® AV PREEMINENT® Peer Rated for Highest Level of Professional Excellence 2019

BRADLEY L. JACOBS 2018 RECOGNIZED BY Best Lawyers

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