
Chadwick I. McCullen

SHAREHOLDER

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Chad McCullen concentrates his practice in the areas of estate planning and administration, asset protection, business law, and commercial real estate matters. He is a Board Certified Specialist in Estate Planning and Probate Law.

In his estate practice, Chad advises clients on planning strategies and prepares a wide variety of documents ranging from basic wills to complex trusts to achieve each client's individual planning goals in the most tax efficient manner. Chad also represents fiduciaries with respect to trust and estate administration matters. He has significant experience in identifying and resolving issues created by closely-held and family owned business interests in the estate planning and administration context.

Chad represents clients in multiple types of business and transactional matters including entity selection, formation, operation, corporate governance, taxation, mergers, acquisitions and reorganizations. He regularly negotiates and drafts a variety of commercial and business documents such as shareholders agreements, employment agreements, and stock and asset purchase agreements.

Additionally, Chad has broad experience in an assortment of real estate matters including acquisition, leasing, finance, development, and foreclosure. He has assisted clients in matters such as the purchase and sale of retail shopping centers, the acquisition of long term care facilities and commercial loan foreclosures.

Chad is a native of Johnston County, North Carolina, and joined the firm in 2014 after practicing with an established eastern North Carolina firm for five years. He was voted a shareholder in 2016.

Education & Bar Admissions

- J.D., with honors, Charleston School of Law, 2008
- Master of Laws in Taxation, University of Florida, 2009
- B.A., University of North Carolina at Chapel Hill, 2005

Admitted in

- North Carolina, 2008
- U.S. Tax Court

Focus Areas

- Administration of Trusts, Estates & Probate
- Asset Protection
- Business Law
- Business Succession Planning
- Estate Litigation & Fiduciary Dispute Resolution
- Real Estate
- Trusts, Estates & Wealth Preservation
- Wills, Trusts & Tax Planning

Achievements

- North Carolina State Bar Board Certified Specialist in Estate Planning and Probate Law, 2015
- Listed in *Business North Carolina Legal Elite™*, Tax and Estate Planning (2017-2021); Business (2018, 2019); Young Guns (2016, 2018, 2019, 2021)
- Selected to the *North Carolina Rising Stars* list (2017-2022) published by Super Lawyers®

Activities

- North Carolina Bar Association Estate Planning and Fiduciary Law Section (Fiduciary Litigation Committee Member), Business Law Section, and Tax Section
- Wake County Bar Association
- NC Museum of History Young Associates Steering Committee (2016-2017)
- Leadership Raleigh (2016)

Publications & Presentations

- Co-Presenter, “*North Carolina State Law Developments*,” 43rd Annual Duke University Estate Planning Conference, October 2021
- Presenter, “*North Carolina Update on State Law Developments*,” Annual Estate Planners Day Program at Queens

University, August 2021

- Co-Author, “*Joint Accounts with Right of Survivorship and Payable on Death Accounts*,” Chapter XVII of the *North Carolina Fiduciary Litigation Manual* published by the North Carolina Bar Association, 2018
- “*Financial, Wealth and Estate Planning Insights for Health Care Professionals*,” presented at seminar on Important Legal Issues Facing Medical Care Providers, September 2017
- “*IRS Grants Simplified Relief for Surviving Spouses Making Late Portability Elections*,” YMH Blog, June 2017
- “*Digital Life After Death: An Overview of the Management and Disposition of Digital Assets at Death*,” presented at seminar on Important Legal Issues Facing Medical Care Providers, November 2016
- “*Who Gets the Little Red Corvette?*” YMH Blog, June 2016
- “*Treasury Issues Regulations on Basis Reporting Consistency*,” YMH Blog, March 2016
- “*The Next Generation: Tools for Making Gifts to Your Children and Grandchildren*,” presented at seminar on Important Legal Issues Facing Medical Care Providers, June 2016

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