



About Suzanne Paulson

Suzanne advises clients in planning their estates to accomplish their personal goals while minimizing transfer tax liability. Her areas of practice include estate and gift tax planning, family succession plans, family limited partnership and other planning vehicles, estate and trust administration, IRS estate and gift tax audits and litigation, and state court probate and trust litigation. She regularly represents individuals in their planning, as well as individual and corporate fiduciaries and beneficiaries in the area of estate and trust administration. With 26 years of experience with the Estate Tax Division of the IRS, Suzanne offers experience and insight with respect to audit and examination issues and controversies, preparation of estate and gift tax returns, valuations, legal issues and minimization of transfer taxes.

Education:

- Cumberland School of Law, Samford University (J.D., 1976)
- Senior Attorney, Estate Tax Division of IRS (1974 - 2000)
- Michigan State University (B.S., 1973)

Areas of Practice:

- Estate and Gift Tax Planning
- Estate and Trust Administration
- IRS Estate and Gift Tax Audits and Litigation
- State Court Probate and Trust Litigation
- Trust Modifications/Terminations

- Prenuptial/Post nuptial Agreements

Admitted to Practice:

- Alabama

Affiliations:

- Alabama Bar Association
- Birmingham Bar Association
- American Bar Association
- Birmingham Estate Planning Council
- Birmingham Tax Forum
- President, Board of Alabama Planned Giving Council
- Women's Section of the Birmingham Bar Association
- Professional Advisors Committee for the Community Foundation of Greater Birmingham
- Samford University Professional Advisors Council
- Accredited Estate Planner® - National Association of Estate Planning Councils

Honors:

- *The Best Lawyers in America*©: Litigation-Trusts and Estates and Trusts and Estates (Copyright by Woodward/White, Inc., of Aiken, SC)
- *Super Lawyers*©: Estate Planning and Probate, Estate and Trust Litigation.
- Listed in Best Lawyers® - Trusts and Estates