Bourland, Heflin, Alvarez, Minor & Matthews, PLC

ATTORNEYS AT LAW

David L. Bourland

David Bourland has an advanced law degree (LL.M.) in taxation and his practice focuses primarily on estate planning, estate and gift taxation, probate and trust administration and business law. David's broad practice and experiences allow him to develop estate plans ranging from the sophisticated estate plan involving complex tax matters to the simple estate plan for modest estates. He has successfully advised multiple family generations regarding the preservation and transfer of family wealth. As an extension of his estate planning services, David also advises closely held businesses in their business succession planning and other business needs.

Estate Planning: David advises individuals and families in the process of arranging for the orderly disposition and administration of one's property. The process starts with an initial meeting to discuss estate property and to determine the client's desires for the transfer of property. The documents typically prepared in connection with an estate plan include a last will and testament, durable power of attorney, health care directives, revocable or irrevocable trust and coordination of beneficiary designations for retirement accounts.

Probate: David advises individuals and families on the transfer of property following one's death and works closely with the personal representative of the estate to ensure proper administration of the estate, the gathering of estate property, paying bills and expenses, and the distribution of estate property to beneficiaries or heirs.

Business Transactions: David advises closely-held businesses in a wide range of matters including choice of entity, business formation, mergers and acquisitions, employment contracts, purchase and sale agreements, business succession planning, non-competition agreements and other business contracts.

Federal and State Taxation: David advises individuals and businesses on Federal and State tax matters including estate and gift taxation and planning, income tax planning, charitable giving, like-kind exchanges, structuring mergers and acquisitions, and real estate transactions.

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Education

- Baylor University
  B.B.A., 1984
- University of Memphis
  Juris Doctor, 1989
- University of Florida
  LL.M. in Taxation, 1992

Practice Areas

- Estate Planning
- Probate
- Business Transactions
- Federal and State Taxation

Professional & Community Activities

- Memphis Bar Association
- Tennessee Bar Association
- Memphis Estate Planning Council
- Certified Public Accountant (Inactive)
- Idlewild Presbyterian Church
- Top rating of "AV" by Martindale-Hubbell

Professional Honors and Awards

- Top Rating of "AV" by Martindale-Hubbell