



## Alan L. Cates

### PARTNER

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Alan counsels clients in taxation, estate planning, business succession planning and probate and trust issues. He also advises tax exempt organizations.

### About the Attorney

Alan has been engaged in the private practice of law in Chattanooga, Tennessee since 1975 and has been licensed as an attorney since September 1972. He is a past President of the Chattanooga Bar Association.

Prior to entering private practice Alan was employed by The University of Tennessee as its Planned Giving officer. He has been on the faculty of the National Planned Giving Institute at the College of William & Mary for more than 25 years. By invitation of various professional and tax exempt organizations, he is a frequent speaker on topics involving taxation, estate planning, business succession planning and probate and trust issues.

Alan is a Fellow of the American College of Trust and Estate Counsel, a Fellow of the Tennessee Bar Foundation and a Fellow of the Chattanooga Bar Foundation. He also serves with a group of other attorneys in Tennessee on the Tennessee Probate Study Committee in reviewing and commenting on pending legislation in the area of trusts, estates and related issues. Alan is listed in the 2008 - 2010 editions of *Best Lawyers in America*® in the areas of Non-Profit/Charities Law and Trusts and Estates. He is also a 2009 *Mid-South "Super Lawyer"*® in the area of Estate Planning & Probate law.

Alan has presented at events throughout the country as well as for the Tennessee Bar Association and several local Bar associations. He has also given presentations to: Estate Planning Councils; exempt organizations; the Annual Convention of the Georgia Society of CPA's; the Tennessee Society of CPA's; Estate Planning and Planned Giving seminars at events for Georgia Tech, Texas A&M, and The University of New Haven.

### Professional Affiliations

- Tennessee Bar Association, Fellow
- Chattanooga Bar Association, Fellow and Past President
- American College of Trust and Estate Counsel, Fellow
- Chattanooga Estate Planning Council
- Chattanooga Planned Giving Council
- Chattanooga Tax Practitioners

### Civic and Charitable Organizations

- First Christian Church - Disciples of Christ, Past President
- Rotary
- University of Tennessee National Alumni Association, Past President

### Practice Areas

- Closely Held Business
- Estate Planning, Trusts & Estates
- Tax
- Tax Exempt Organizations

### Education

- J.D., University of Tennessee, 1972
- B.S., University of Tennessee, 1967

### Admissions

- Tennessee
- U.S. Supreme Court
- U.S. Tax Court