HUSCH BLACKWELL

Alan L. Cates

OF COUNSEL

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OVERVIEW

Alan focuses his practice on investment management and private wealth matters.

With decades of comprehensive legal experience, he has guided individuals and their businesses in estate planning and business succession planning. Additionally, Alan has represented individual and institutional executors and trustees in virtually all sorts of litigation matters, both as defense counsel and initiating action. He has also represented taxpayers in administrative proceedings and in courtrooms, and provided critical services to tax-exempt organizations. He also has served as "general counsel" to families and their businesses. Alan's industry work includes:

- Assisting one of the largest American banks in the tax-exempt organization portion of a community development project in Chicago involving complex matters.
- Advising a Fortune 500 bank holding company regarding trust and estate and litigation matters.

In addition, Alan frequently presents on financial topics such as taxation, estate planning, business succession planning and probate and trust issues across the country. He has spoken before the Tennessee Bar Association, the Tennessee Society of CPAs, estate planning councils, and at estate planning and planned-giving seminars at the Georgia Institute of Technology, Texas A&M University and the University of New Haven.

Alan is a member of the Tennessee Probate Study Committee, which reviews and comments on pending legislation in the areas of trusts, estates and similar issues. Before entering private practice in 1975, Alan served as the

Industry

Financial Services & Capital Markets

Services

Litigation & Alternative Dispute Resolution

Nonprofit Organizations & Religious Institutions

Private Wealth

Tax

Trust, Estate, & Fiduciary Litigation

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planned giving officer for the University of Tennessee. He also served on the faculty of the National Planned Giving Institute at the College of William & Mary for more than 25 years.

Experience

- Assisted one of the largest American banks in the tax-exempt organization portion of a community development project in Chicago involving complex matters.
- Advised a Fortune 500 bank holding company regarding trust and estate and litigation matters.

Recognition

- BL Rankings' *The Best Lawyers in America*®
  - Litigation-Trusts and Estates, 2003-2027
  - Non-Profit/Charities Law, 2003-2027
  - Trusts and Estates, 2003-2027
  - *Best Lawyers*® Trusts and Estates "Lawyer of the Year," Chattanooga, 2010, 2017, 2025
  - *Best Lawyers*® Nonprofit/Charities Law "Lawyer of the Year," Chattanooga, 2020, 2023, 2025
- Chattanooga Bar Association, Jac Chambliss Lifetime Achievement Award, 2025
- Chattanooga Bar Association, Harry Weill Zealous Practice of Law Award, 2010
- Legal Aid of East Tennessee, Charles W. "Buz" Dooley Pro Bono Hall of Fame, 2024
- Legal Aid of East Tennessee, Bruce C. Bailey Volunteer Lawyer of the Year Award
- Mid-South Super Lawyers, Estate Planning & Probate, 2006-2020

Education

- J.D., University of Tennessee College of Law
- B.S., University of Tennessee

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Admissions

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

Community Leadership

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

The Best Lawyers in America®

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