SpencerFane®

Serena O'Neil to Advise Business Owners at Trust & Wealth Management Conference

October 20, 2025
211 Athens Way Ste 100 Nashville, TN 37228

Spencer Fane attorney Serena O'Neil will speak at the Tennessee Bankers Association's October 20-21 Trust & Wealth Management Conference in Nashville.

For her session, Planned Succession: Estate Planning Considerations Prior to Exiting the Business, Serena will illustrate the knowledge tax, trusts, and estates attorneys bring to business owners looking to sell their businesses. She will cover the federal transfer tax system and its relevance, key estate planning documents and corporate documents to implement ahead of a sale, state income tax planning options, and how trusts can help business owners save money.

At Spencer Fane, Serena has a person-centered estate planning practice in which she partners with her clients to create personalized estate plans that fit their family, wealth, charitable, and business goals. She often works with high-net-worth individuals and business owners to craft estate plans and draft many different types of trusts that meet their business succession planning, tax planning, and charitable giving objectives.

View the full conference agenda and register here.