



SpencerFane®

Jonathan R. Burns

Partner

Contact

Nashville

P 615.238.6330 | F 615.238.6301

jburns@spencerfane.com



Overview

Jonathan R. Burns helps both individuals and businesses with structuring transactions and arranging their personal financial affairs to minimize, defer, or eliminate taxes. He concentrates his practice in the areas of estate planning, probate, corporate law, mergers and acquisitions, real estate, and taxation.

While in law school at the University of Mississippi, Jonathan discovered his desire to help others make sure their financial affairs were in order from a legal standpoint. He then went on to pursue and obtain an LLM in taxation from Washington University in St. Louis with a primary focus on estate planning.

Education

- Washington University in St. Louis, 2011 (LLM)
- University of Mississippi School of Law, 2010 (J.D.)
- Middle Tennessee State University, 2006 (B.B.A.)

Bar Admissions

- Mississippi, 2011
- Tennessee, 2010

Distinctions

- *Best Lawyers in America*, Ones to Watch, 2021

Memberships

- Nashville Bar Association

- Tennessee Bar Association
- Mississippi Bar Association
- Estate Planning Council of Middle Tennessee

Related Experience

- Assists clients in the preparation of various estate planning documents including but not limited to:
 - Last Wills and Testaments.
 - Durable General Powers of Attorney.
 - Healthcare Powers of Attorney.
 - Living Wills.
 - Tennessee Community Property Trusts.
 - Tennessee Tenancy by the Entirety Trusts.
 - Tennessee Investment Services Trusts.
 - Spousal Lifetime Access Trusts.
 - Irrevocable Life Insurance Trusts.
 - Charitable Remainder Trusts.
 - Charitable Lead Trusts
- Assists clients in the following strategies:
 - Sales to Beneficiary Defective Inheritor's Trust (BDIT).
 - Sales and Gifts to Intentionally Defective Grantor Trust (IDGT).
 - Sales and Gifts to Grantor Retained Annuity Trust (GRAT).
- Handles complex probate cases involving but not limited to:
 - Estates with Business Interests.
 - Lawsuits.
 - Estates Subject to Federal Estate Taxes.
 - Multimillion-Dollar Estates.
- Assisted client in obtaining disadvantaged business enterprise (DBE) status.
- Represented seller in \$30 million sale of oil change & service center company with approximately 30 locations.
- Represented seller in \$25 million sale of optical business.
- Represented seller in \$3 million sale of software company.
- Represented seller in multimillion-dollar sale of water bottling company.
- Represented seller in multimillion-dollar sale of landscaping/outdoor services business.
- Represented seller in multimillion-dollar sale of bedding company.
- Represented seller in the sale of trucking business.
- Represented seller in the sale of grave vault business.
- Represented buyer in the purchase of accounting firm.
- Assisted various types of 501 (c) entities in forming the organization, obtaining tax-exempt status, filing IRS form 1023 and other applicable forms.
- Drafted commercial and residential lease agreements.
- Served as qualified intermediary for 1031 transactions.