



SpencerFane®

Samuel Thomas

Of Counsel

Contact

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Overview

Samuel is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization and focuses his practice on the representation of high net-worth individuals, families, and fiduciaries with respect to estate planning, probate, estate, and trust administration, closely-held business succession planning, entity formations, and wealth preservation.

Clients, particularly those who have complex assets or trust structures, rely on Samuel's experience to help them implement tax strategies to minimize federal gift and estate taxes and preserve assets in their family for future generations.

A large part of Samuel's practice involves assisting families and estate fiduciaries through the administration of a decedent's estate. He helps his clients through every phase of the probate, estate, and trust administration process, including gathering and appraising assets, preparing gift tax returns and estate tax returns, distributing assets to beneficiaries, and funding various trusts.

Samuel brings a personal approach to his practice, building relationships with his clients and their families that provide him with a deep understanding of their needs and desires for their estate planning. He understands that the most challenging problems can be solved by a collaborative team dedicated to bringing value and protecting the client's interests. Being part of a full-service firm, Samuel draws on the diverse experience of his colleagues to design strategies that will achieve his client's objectives when it involves unique issues that overlap with other practice areas. He also works with his clients' teams of accountants, financial advisers, and other professionals to effectuate their estate plan and wealth preservation strategies.

Education

- Texas Southern University Thurgood Marshall School of Law (J.D.)
- Houston Baptist University (B.S.)

Bar Admissions

- Texas

Distinctions

- Texas Board of Legal Specialization, Board Certified, Estate Planning and Probate Law

Memberships

- State Bar of Texas, Real Estate, Probate and Trust Law Section
- Charitable Gift Planners of Houston
- Houston Estates and Financial Forum
- Houston Bar Association, Real Estate, Probate and Trust Law Section

Related Experience

- Preparation of wills and trusts.
- Probate, estate, and trust administration.
- Planning to minimize gift tax, estate tax, and generation-skipping transfer tax.
- Business succession planning and entity formation.
- Preparation of premarital, marital, and cohabitation agreements.
- Planning with life insurance.
- Preparation of gift tax returns and estate tax returns.

Clerk Experience

- Honorable Rory Olsen, Harris County Probate Court No. 3, Houston, Texas