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## EXPERTISE

Estate Planning & Administration, Tax, Probate Litigation

## EDUCATION

American University Washington College of Law, J.D., 1986

Colgate University, B.A., with Honors, 1982

## ADMITTED IN

Colorado

For three decades, Steve Brainerd has assisted individuals and families with careful, tax-sensitive planning for the protection and transfer of their estates. His practice has involved the preparation of all levels of testamentary and trust documents, including instruments designed to implement lifetime gifting programs. Mr. Brainerd has special expertise in matters ranging from title and conveyance issues to planning problems facing non-U.S. citizens to sophisticated charitable giving techniques to the development of marital agreements. With the firm's Finance & Acquisitions Group, he also assists in planning for the succession of family-owned businesses and the creation of entities to facilitate the transfer of family wealth.

In representing executors and trustees, Mr. Brainerd has worked in every phase of probate and trust administration, trust and estate litigation, family dispute resolution, estate taxation, and fiduciary income taxation. He is regularly engaged by banks and trust companies in matters involving fiduciary risk management, tax reporting obligations, and litigation. He has served as an expert witness on issues ranging from the discharge of fiduciary duties to professional practice standards to the status of trusts in divorce proceedings.

Mr. Brainerd has assisted some of Colorado's most prominent charitable organizations with the development of their planned giving programs, their administration of trusts and annuities, the protection of their rights in charitable contributions, and their advisory support of

donors. He has also counseled both large and small charities with respect to their operational and tax-reporting obligations.

Mr. Brainerd is a fellow of the American College of Trust and Estate Counsel and has served as an adjunct professor of Trusts and Estates Law at the University of Denver Sturm College of Law. He has been named in every publication of *Colorado Super Lawyers* by Thomson Reuters since 2006, listed in every edition of *The Best Lawyers in America*® since 2008, and recognized by *Best Lawyers*® as a Denver "Lawyer of the Year" in the area of Trust and Estates – Litigation for 2015, 2018, 2021, and 2024. Mr. Brainerd is a past chair of the Trust & Estate Section of the Colorado Bar Association and currently serves as the Section's representative in state legislative matters.