

JOHN C. OVERBY

Member

New Orleans

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OVERVIEW

John Overby is an Estate Planning and Administration Specialist, certified by the Louisiana Board of Legal Specialization. His practice focuses on estate planning, taxation planning, wills and trusts, employment law and general business consulting. He also advises clients on marital agreements, powers of attorney, living wills, special needs trusts, family wealth transfers and the administration of decedents' estates.

In his free time, John performs pro bono work through the Pro Bono Project. He previously served on the Board of Governors for the Jefferson Chamber Foundation Academy, a charter school that once provided online learning opportunities to at-risk children.

REPRESENTATIVE MATTERS

- Estate planning for individuals and families, including advising and preparation of wills, trusts, marital agreements, financial and health care powers of attorney, living wills and special needs trusts.
- Represented limited liability company ("LLC") in the negotiation, drafting and closing of the sale of the estate's interest in the LLC to the surviving members.
- Developed and coordinated numerous estate plans, including succession planning to facilitate the transfer of the family business to future generations and the creation of LLCs and other entities to protect family ownership, ensure continuity of management and to provide an efficient means of making gifts.
- Probate of wills and counsel to executors and trustees in carrying out their fiduciary duties related to administration and settlement of estates and trusts.

PROFESSIONAL AND CIVIC ACTIVITIES

- American Bar Association member.
- Louisiana State Bar Association member.
- Tennessee Bar Association member.

HONORS & AWARDS

- *New Orleans Magazine* "Top Lawyer" 2020 - 2022.

PRACTICE AREAS

Estate Planning, Administration of Trusts and Estates

Tax and Tax Controversy

Employment

BAR ADMISSIONS

Louisiana

Tennessee

EDUCATION

Tulane Law School, J.D., *cum laude*, 1996

Georgetown University Law Center, LL.M., Taxation and Certificate in Employee Benefits Law, 2003

Louisiana State University, B.A., 1990

PRESENTATIONS

"Grantor Trusts," National Business Institute Top Estate Planning Techniques Seminar, November 2017.

"Pre and Post Sale Planning for You, Your Company and Your Family," M&A Solutions for Privately Held Companies Conference, June 2017.

"Recent Developments in Estate and Gift Tax Law," Society of Financial Service Professionals Winter Conference, 2013.