Derry Swanger

Curriculum Vitae

Derry Swanger has extensive experience in assisting U.S. and non-U.S. clients with the design and implementation of traditional and more sophisticated estate planning and asset protection strategies. This includes the preparation and implementation of wills, revocable and irrevocable trusts, disability documents, marital property agreements, corporations, partnerships, and limited liability companies for business succession planning, as well as beneficiary designations necessary to coordinate a client's life insurance and retirement assets with his or her overall plan. Mr. Swanger has worked extensively with individual and corporate executors and trustees, advising them with respect to the tax and non-tax issues associated with the administration of estates and trusts, and is experienced in the judicial construction, reformation, modification, and termination of trusts.

Mr. Swanger also has substantial experience in advising clients about charitable giving issues and about the creation of tax-exempt organizations, including public charities, private foundations, and private operating foundations. Mr. Swanger is board certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization, is a Fellow of the American College of Trust and Estate Counsel, serves as legal advisor to the Ballet Austin Foundation, and is an active member of various other professional and civic organizations.

Education

Southern Methodist University School of Law (J.D., 1984)

University of Texas at Austin (B.B.A., Accounting, with highest honors, 1981)

Professional Affiliations and Honors

American College of Trust and Estate Counsel (ACTEC), Fellow

Best Lawyers 2010 Austin Trust and Estates Lawyer of the Year

Listed in The Best Lawyers in America, *Trusts and Estates* (1995 through present)

Texas Super Lawyer (2003 through present)
Texas Monthly and Law & Politics magazines
- Listed in the Top 50 Attorneys in Central and West Texas (2005 through 2007)

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

American Bar Association
- Real Property, Trust and Estate Law Section
- Taxation Section
- Past Chair, Estate and Gift Tax Committee

State Bar of Texas
- Real Property, Probate and Trust Law Section
- Tax Section

Austin Bar Association
- Estate Planning & Probate Section

Professional Publications

"The Mobile Client: Tax, Community Property, and Other Considerations," co-author, BNA Tax Management, Estates, Gifts, and Trusts Portfolios (803-2nd, 2004)

"Offshore Life Insurance Planning for U.S. Clients," ACTEC Notes (Volume 26, No.1, Summer 2000)

Professional Presentations

"Charitable Giving Techniques Revisited: What Opportunities Am I Missing and What Potholes Should I Avoid?" State Bar of Texas Advanced Estate Planning Strategies Course (Santa Fe, New Mexico; April 2002)

"Estate Planning With Income in Respect of A Decedent," American Bar Association Section of Taxation, Estate & Gift Taxes Committee (Washington, D.C., May 2001)

"Transfer Tax Simplification," American Bar Association Section of Taxation 2001 Midyear Meeting, Estate and Gift Taxes Committee (Scottsdale, Arizona; January 2001)

Contact Information

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