HARRISON MOBERLY, LLP
ATTORNEYS

James J. McGrath

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PRIMARY PRACTICE
Advises wealthy individuals, highly compensated executives, professionals and the owners of closely-held family businesses on tax, legal and estate planning issues.

EXPERIENCE
Mr. McGrath works with clients to minimize federal and state taxes with wills and trusts consistent with their personal concerns and estate planning objectives, and to provide for asset protection and liquidity by revocable trusts, powers of attorney, programs of lifetime gifts and effective uses of life insurance. He is experienced in recommending optimum choices for retirement plan accumulations and distributions, organizing or reorganizing family businesses, maximizing income or estate tax benefits on sales or gifts of appreciated property through charitable gifts, providing estate and trust legal administrative services, and providing presentation in federal or state tax audits or litigation. Mr. McGrath was a senior trial attorney in the office of the IRS Regional Counsel (Indianapolis). He serves as a tax advisor to local not-for-profit organizations.

EDUCATION
LaSalle College, A.B., 1964; Villanova University, J.D., 1967

BAR ADMISSION
Indiana, Pennsylvania

MEMBER
Indianapolis (taxation, business, probate and estate planning sections) and Indiana (taxation, business, probate and estate planning sections) Bar Associations