# JAMES J. MCGRATH

HARRISON MOBERLY

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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