Douglas J. Stanley

Partner St. Louis

T: +1 314 259 2926
E: doug.stanley@bclplaw.com

Douglas (Doug) Stanley counsels and advises clients, including high net-worth individuals, professionals and entrepreneurs, on a wide range of sophisticated estate planning, tax and fiduciary matters. His broad practice includes estate planning and administration as well as income tax planning, with a particular emphasis in the areas of wealth transfer tax planning and wealth transfer strategies. Mr. Stanley has experience in individual estate administration, closely-held business

Practices

Private Client

Banking

Finance

Litigation & Dispute Resolution

Higher Education Team

Sports & Entertainment

Tax & Private Client

Fiduciary Disputes (Co-Leader)

succession planning, asset protection and tax financial planning.

As co-leader of the firm’s Fiduciary Litigation Team, a significant portion of Mr. Stanley’s practice is dedicated to fiduciary conflict resolution and tax controversy work, including representation of clients in trust and estate administration disputes in local courts, during IRS audits and in the U.S. Tax Court. Mr. Stanley is a member of the Fiduciary Litigation Committee of ACTEC. He is frequently called upon to speak on fiduciary topics throughout the United States and has been quoted or featured by *The Wall Street Journal*, CNN and Financial Planning. Mr. Stanley is currently an adjunct professor in Tax at Washington University School of Law and a Fellow of the American College of Trust and Estate Counsel.

Mr. Stanley has developed many detailed and specialized estate plans which have included revocable trusts, qualified personal residence trusts, grantor retained annuity trusts, partnerships, limited liability companies, irrevocable defective grantor trusts, and private annuities. Additionally, he has experience with life insurance trusts, retirement account analysis, planning for non-U.S. citizens, charitable trusts, foundations and other charitable planning. Mr. Stanley routinely negotiates and prepares premarital and postmarital agreements to coordinate with an individual’s estate planning goals. Prior to law school, Mr. Stanley practiced as a CPA with an international accounting firm.

Admissions

Illinois, 2002

Missouri, 1995

Arkansas, 1991

United States Tax Court

Education

Washington University, J.D., Order of the Coif, 1991

University of Central Arkansas, B.A., 1985

Civic Involvement & Honors

- St. Louis Volunteer Lawyers and Accountants for the Arts - Former Member, Board of Directors
- Washington University School of Law - Adjunct Professor, LL.M. in Taxation program since 2001
- Historic Preservation Commission for the City of Webster Groves, Missouri, Member
- St. Louis Children’s Hospital - Member and former Chairman, Children’s Legacy Advisors Leadership Board
- St. Louis Children's Hospital Foundation - Member, Board of Directors
- YouthBridge Community Foundation - former Member, Board of Directors
- *The Best Lawyers in America®*, 2018, 2020

Professional Affiliations

- American College of Trust and Estate Counsel, Fellow
- Fiduciary Litigation Committee
- Communications Committee
- State Laws Committee
- American Bar Association
- Bar Association of Metropolitan St. Louis – Probate and Trust Law Steering Committee, former Member and past Chair
- Estate Planning Council of St. Louis
- Society of Trust and Estate Practitioners (STEP), Member
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Speaking Engagements

- "Tax Issue Spotting," Missouri Bar 2020 Annual Estate, Trust & Elder Law Institute, December 10 - 11, 2020
- CLE: Litigation Risks of COVID-19 Remote Witness and Notary Laws, The Federal Bar Association, May 15, 2020
- "Trust Modifications," 2nd Annual Trust and Estates Disputes Symposium, St. Louis, August 29, 2019
- “Update on Trust Modifications, Non-Judicial Settlement Agreements & Trust Decanting,” Missouri Bar Annual Estate, Trust & Elder Law Institute, Sept. 6, 2018
- “Decanting in 2018 and Beyond – A Trap or a Solution?,” 29th Annual Trust & Estate Planning Institute, St. Louis, Mo., May 3, 2018

- “Recent Developments in Fiduciary Litigation,” 2018 Fiduciary Litigation Seminar, hosted by the Bar Association of Metropolitan St. Louis, St. Louis, Mo., Feb. 27, 2018
- "Tax and Estate Planning," Pre-Retirement Seminar organized by the Dallas Regional Office of the Office of the Comptroller of the Currency, Dallas, Tex., Dec. 13, 2017
- “Dealing With Clients With Competing Interests,” University of Arkansas Little Rock Law School, hosted by the University of Central Arkansas, Little Rock, Ark., Oct. 5, 2017
- “It’s Official – I’m An Income Tax Lawyer,” ACTEC Heart of America Region Meeting, Bentonville, Ark., April 22, 2017
- “Creating a Living Legacy," Regional Arts Commission hosted by the Volunteer Lawyers and Accountants for the Arts, St. Louis, Mo., Feb. 13, 2017
- "The Complete Trust Workshop,” Montana Society of CPAs in Missoula, Mont., Nov. 14, 2016
- “Tax and Estate Planning,” National Geospatial-Intelligence Agency's Retirement Planning Seminar, St. Louis, Mo., Mar. 3, 2016
- “Same Sex Marriage Estate Planning Issues,” Kansas City Estate Planning Council, Kansas City, Mo., Feb. 18, 2016
- Co-Presenter, "Estate Planning," Washington University in St. Louis’ Lifelong Learning Institute, Jan. 29, 2016
- “Multi-Generational Estate Planning Issues,” Missouri Society of CPAs, St. Louis, Mo., Dec. 22, 2015
- “Recent Developments in Missouri and Federal Law Affecting Estates and Trusts," Missouri Bar Annual Estate & Trust Institute, Columbia, Mo., Oct. 23, 2015

- “Recent Developments in Missouri and Federal Law Affecting Estates and Trusts," Missouri Bar Annual Estate & Trust Institute, St. Louis, Mo., Sept. 25, 2015
- “Recent Developments in Missouri and Federal Law Affecting Estates and Trusts," Missouri Bar Annual Estate & Trust Institute, Springfield, Mo., Sept. 11, 2015
- Co-Presenter, “DOMA (Defense of Marriage Act) Planning,” American Red Cross Professional Advisors Seminar, May 20, 2015
- “Tax Updates,” ACTEC Regional Meeting, St. Louis, Mo., Apr. 25, 2015
- “Same Sex Estate Planning,” Kansas City Bryan Cave LGBT Affinity Group, Apr. 8, 2015
- “Gift Planning Strategies,” Washington University in St. Louis’ Faculty and Staff, Apr. 2, 2015
- “Tools, Tips, Tricks, and Traps of Estate Planning and Charitable Giving,” Missouri History Museum, Oct. 9, 2014
- "Estate Tax Returns and Portability," MOKAN Trust Conference, Overland Park, Kan., May 8, 2014
- "Estate Planning and Qualified Retirement Plans-Options and Opportunities," Washington University, St. Louis, Mo., May 1, 2014
- “Estate Planning Issues for the Middle-Income Client,” South Carolina Association of CPAs, West Columbia, S.C., Nov. 21, 2013
- “The Complete Trust Workshop,” Ohio Society of CPAs, Akron, Oh., Oct. 21, 2013
- “Advanced Issues for Trusts, Estates and Their Beneficiaries,” North Carolina Association of CPAs. Greensboro, N.C., Sept. 23, 2013
- “What You Need To Do Now In Estate Planning,” Regional Learning Alliance sponsored by the Pennsylvania Institute of CPAs, Cranberry, Penn., Nov. 2, 2012
- "Dealing with Conflicts Between a Fiduciary and Beneficiaries," MOKAN Conference, Overland Park, Kansas, May 2012

- "What You Need To Do Now In Estate Planning," Ohio Society of CPAs, Columbus, Ohio, December 2011
- "Use of Charitable Lead Trusts," Employees of St. Louis Children's Hospital and Barnes-Jewish Hospital, St. Louis, Missouri, October 2011
- "Role of A Fiduciary In Estate Planning," Bar Association of Metropolitan St. Louis, October 2009
- "Gift and Estate Tax: Procedure and Strategy," NBI, December 2008
- "Successful Wealth Transfer Techniques in Missouri," NBI, November 2004
- Panel member – Probate and trust law segment of "Legally Speaking in St. Louis," cable TV show sponsored by the Bar Association of Metropolitan St. Louis, November 2003
- "Family Limited Partnership Formation" seminar, Family Limited Partnership Series sponsored by the Bar Association of Metropolitan St. Louis, September 2002
- "How to Draft Wills and Trusts in Missouri," NBI, February 2002

Events

St. Louis Office Hosts Annual Trust and Estates Symposium

Stanley to Present at 2018 Fiduciary Litigation Seminar