JENNIFER CLUMP DAVIS

OFFICER
10 South Broadway
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St. Louis, MO 63102
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Practice Areas

- Educational, Religious & Tax-Exempt
- Trusts & Estates
  - Asset & Divorce Protection Planning
  - Charitable Planning
  - Corporate Fiduciary Representation
  - Estate, Gift & Fiduciary Income Tax Return Preparation
  - Estate, Gift & Income Tax Planning
  - Estate Planning
  - Family Business & Succession Planning
  - Prenuptial & Postnuptial Agreements
  - Probate & Trust Administration

"Whether it's families or corporate clients, developing relationships and helping them reach their goals is rewarding — taking highly technical concepts and translating them into their daily existence."

Whether setting up a family estate plan or helping a bank untangle issues as a corporate fiduciary, Jennifer Davis is adept at taking complex estate and tax planning matters and applying them to clients' daily needs. As a member of the firm's Trusts & Estates Practice Group, she works with clients ranging from business owners and multi-generational families to some of the region's largest financial institutions.

Jennifer has helped individuals and families with issues related to estate planning, charitable planning, probate and trust administration, family business entities, succession business planning and wealth preservation strategies. She has assisted with trust, estate and tax controversies, tax return preparation and prenuptial and postnuptial agreements. Many estate planning clients continue to turn to her for guidance on asset protection as life changes or business questions arise, and she works to maintain those relationships through responsive service and sound advice.

In addition to representing individuals, Jennifer represents financial institutions regarding issues that arise while serving as corporate fiduciaries. She also helps broker/dealers, trust companies, banks and

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Trusts & Estates Litigation

Industries

Closely Held Businesses/Private Client

Financial Services

Disputes, Arbitration and Litigation

Admissions

Missouri

Illinois

Education

J.D., Saint Louis University School of Law, *cum laude*, 1996

B.A, Denison University, *cum laude*, 1993

investment advisors in handling and resolving day-to-day issues stemming from the authority granted to trustees, powers of attorney, personal representatives, administrators and beneficiaries.

She works with a number of non-profit organizations on their planned giving programs, endowments and administrative issues.

Jennifer writes and speaks frequently on estate planning topics — including charitable planning, planning for children with special needs, premarital agreements, probate administration and planning for digital assets — and writes for the firm's Trusts & Estates newsletters. She previously served as a member of the firm's Board of Directors and is a former leader of the Trusts & Estates Practice Group.

PROFESSIONAL AFFILIATIONS

- American College of Trust and Estate Counsel, Fellow
- Estate Planning Council
- National Committee on Planned Giving
- St. Louis Planned Giving Council
- Family Office Exchange
- American Bar Association
- The Missouri Bar
- Illinois State Bar Association
- Bar Association of Metropolitan St. Louis
- Missouri Bar Estate, Trust & Elder Law Institute, Planning Committee member, 2016 and 2017
- Missouri Bar Probate & Trust Law Committee, Digital Assets Subcommittee member

COMMUNITY/CIVIC ACTIVITIES

- Dance St. Louis, Board of Directors, President
- St. Louis Children's Hospital, Legacy Advisors Executive Committee

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HONORS & AWARDS

- Chambers High Net Worth Guide, 2021
- St. Louis Small Business Monthly, Top Business Advisors, 2021
- The Best Lawyers in America, Trusts and Estates, 2016-2021
- St. Louis Small Business Monthly, "100 St. Louisans You Should Know to Succeed in Business," 2016
- St. Louis Small Business Monthly, Top Lawyer of the Year, 2012
- Five Star Wealth Manager Award, 2012
- Martindale-Hubbell AV Preeminent
- Saint Louis Business Journal, "40 Under 40," Class of 2008

NEWS

Jennifer Davis, Keith Herman earn Chambers rankings for private wealth law
July 22, 2021

Jennifer Davis featured in St. Louis Small Business Monthly's Top Business Advisors section
St. Louis Small Business Monthly, March 2021

Best Lawyers 2021 Lists 54 Greensfelder Attorneys, including Five ‘Lawyers of the Year’
August 20, 2020

Congratulations to Jennifer Davis on making St. Louis Small Business Monthly’s Best Attorneys list for 2020
August 6, 2020

42 Greensfelder attorneys named to 2020 Best Lawyers
August 15, 2019

Interview with Jennifer Davis, "Unlocking Clients’ Digital Lives"
Financial Advisor, August 21, 2018

38 Greensfelder attorneys named to 2019 Best Lawyers, including four ‘Lawyers of the Year’
August 2018

Interview with Jennifer Davis, "Your online life remains big deal — even in death"
Illinois Business Journal, August 2016

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Jennifer Davis and Leonard Vines recognized among *St. Louis Small Business Monthly*'s 100 St. Louisans You Should Know.
April 5, 2016

American College of Trust and Estate Counsel elects Jennifer Davis as fellow
October 23, 2015

Interview with Jennifer Davis, "Legal Corner: Know What You Can Trust"
Ladue News, July 24, 2014

Interview with Jennifer Davis, “Looking for Answers”
St. Louis Magazine, February 2014

Interview with Jennifer Davis, "Does estate legal work fit in today's big-firm model?"
St. Louis Business Journal, February 8, 2013

Interview with Jennifer Davis, "Year-End Gifting Opportunities"
KMOX, December 11, 2012

Interview with Jennifer Davis, "New trust offers shield from malpractice"
St. Louis Business Journal, July 6, 2012

Interview with Jennifer Davis, "Build Investment Relationship on Trust, Shared Goals"
St. Louis Business Journal, March 23, 2012

Interview with Jennifer Davis, "Exemptions create great era for gifting"
St. Louis Business Journal, November 4, 2011

Interview with Jennifer Davis, "Gift tax rules make now a good time to give real estate"
Ask the Expert Column
St. Louis Post Dispatch, October 21, 2011

Interview with Jennifer Davis, "One-time Tax Exemptions"
KMOX, December 6, 2010

Interview with Jennifer Davis, "One-time Exemptions Help Skirt Estate Tax Issue"
St. Louis Business Journal, December 3, 2010

SEMINARS & SPEAKING ENGAGEMENTS

"What's Next for your Financial Health?" webinar
June 24, 2020

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"Keeping It in the Family: Planning for the Vacation Home or the Family Farm"
Greensfelder's Annual Estate Planning Symposium, St. Louis, MO, November 7, 2019

"Customizing an Estate Plan for Today's Family"
Greensfelder's 2018 Estate Planning Symposium, St. Louis, MO, November 1, 2018

"Tough Calls: Estate Planning for Families Facing Addiction Issues"
The Missouri Bar Annual Estate, Trust & Elder Law Institute, St. Louis, September 6, 2018

"From Simple to Sophisticated: Top Ten Planned Giving Techniques"
2017 Greensfelder Estate Planning Symposium, November 2, 2017

"Counseling Clients for #DigitalDeath"
Estate, Trust & Elder Law Institute, St. Louis, MO, September 27, 2017

Moderator, "How to Identify a Probate Case and Select a Proper Procedural Path – Moving Forward with the Basics"
Estate, Trust & Elder Law Institute, St. Louis, MO, September 27, 2017

Building Flexibility Into Your Plan: Directed Trusts and Trust Protectors
Greensfelder Estate Planning Seminar, November 3, 2016

“Directed/Delegated Investment Trusts & Trust Protectors”
Missouri Bar Estate, Trust & Elder Law Institute, St. Louis, Missouri, August 26, 2016

"Handle with Care: Planning for the Fragile Beneficiary"
2015 Greensfelder Estate Planning Seminar, November 19, 2015

“Planning for Digital Assets”
Estate Planning Institute, The Bar Association of Metropolitan St. Louis, April 22, 2015

2014 Estate Planning Seminar
November 13, 2014

2014 Securities Symposium
November 5, 2014

"Stay Linked with Your Clients by Helping Them Forever Friend Their Digital Property"
Annual Estate & Trust Institute, MoBar CLE, St. Louis, October 17, 2014 | Jefferson City, October 24, 2014

"Handle with Care – Planning for the Fragile Beneficiary"
Annual Estate & Trust Institute, MoBarCLE, St. Louis, October 11, 2013 | Jefferson City, October 25, 2013

"Fiscal Cliff Averted - What Does This Mean For Tax Planning?"
Greensfelder Estate Planning Symposium, October 16, 2013

"Stay Linked with Your Clients by Helping Them Forever Friend Their Digital Property"
Missouri Bar Annual Meeting and Judicial Conference, Columbia, September 2013

"Just Because It's Irrevocable Doesn't Mean It's Irrevocable"
Annual Estate & Trust Institute, MoBar CLE, September 2012

"Planned Giving - Not Just for the Rich and Famous"
Annual Estate & Trust Institute, MoBar CLE, September 2011

"Ethical Scenarios for Probate and Estate Planning"
Annual Estate & Trust Institute, MoBar CLE, September 2009

"Charitable Giving Arsenal"
Annual Probate Institute, Missouri Bar, September and October 2007

"Reasons for Estate Planning"
MAC Sports Conference, April 2007

"Problems in Estate Planning for a Second Marriage"
University of Missouri - Kansas City, Continuing Legal Education, 13th Annual Estate Planning Internship Program, October 2006

"Drafting a Pre-Marital Agreement"
University of Missouri - Kansas City, Continuing Legal Education, 12th Annual Estate Planning Internship Program, September 2005

“Ethical Considerations in Post-Mortem Planning”
Advanced Post-Mortem Planning and Probate in Missouri, National Business Institute, September 8, 2004

“Directors’ and Trustees’ Liabilities”
Tax-Exempt Organizations in Missouri, Lorman Education Services, April 2003

PUBLICATIONS

Articles & Books

Keeping it in the family: Planning for the vacation home
St. Louis Business Journal, January 4, 2021

Handle with care: Tips on planning for the fragile beneficiary
St. Louis Business Journal, December 17, 2020

“Counseling Clients for #DigitalDeath”
Journal of The Missouri Bar, May/June 2015

"Litigation Settlements in Probate Matters"
Settling Cases MoBarCLE Deskbooks, 2014

"Golden chance: How to take advantage of new estate planning opportunities"
Smart Business Magazine, October 2009

"Shall a Special Needs Trust be created?"
Leave A Legacy Publication, September 2005

Newsletters

Unique Tax Planning Opportunities During Uncertain Economic Times
October 2020

Tough Calls: Estate Planning for Families Facing Addiction Issues
June 2019

The Importance of Protecting Your Digital Assets: What it Means for Your Estate Plan
August 2018

What Can an Estate Plan Do for You?
July 2018

Use of Trusts to Accomplish Estate Planning Objectives
July 2018

Powers of Attorney for Your College-Age Child
June 2018

"Investing in the Future: Planning to Protect Business and Family Interests"
April 2018

"Planning Your Charitable Legacy"
March 2018

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"From Simple to Sophisticated: Top 10 Planned Giving Techniques"
March 2018

"The Most Important Reasons for Estate Planning"
Greensfelder Trusts & Estates Newsletter, August 2017

"Flexibility in Your Estate Plan"
March 2017

“Investing in Your Family and Creating Your Legacy”
Greensfelder Trusts & Estates Newsletter, February 2015

"The Importance of Protecting Your Digital Assets: What it Means for Your Estate Plan"
Greensfelder Trusts & Estates Newsletter, November 5, 2014

"The NEW Missouri Qualified Spousal (Joint) Trust - The Perfect Asset Protection Technique?"
March 5, 2012

“Are You Ready to Make a Gift? Top Ten Things to Consider”
Greensfelder Trusts & Estates Newsletter, 2011

"Special Needs Trusts"
Greensfelder Trusts & Estates Newsletter, August 6, 2008

"Coordinating Your Retirement Accounts With Your Estate Plan"
Greensfelder Trusts & Estates Newsletter, 2006

"Estate Planning for Professional Athletes"
Greensfelder Trusts & Estates Newsletter, Fall 2004