

Who we are:

## GALE ALLISON

*Attorney-at-Law*

Gale Allison is the founder of *The Allison Firm*. Ms. Allison has over thirty years of legal and tax experience. She received a Bachelor of Arts degree in English in 1973 from the University of Georgia, a doctor of law degree in 1975 from the University of Tennessee, and a Masters of Laws in Taxation from Emory University in 1980. Ms. Allison was an Estate and Gift Tax Attorney for the IRS prior to entering private practice. She is a member of the Tulsa County Bar Association, the Oklahoma Bar Association, the State Bar of Georgia, the Tennessee Bar Association, and the American Bar Association. In addition, Ms. Allison is a member of the Estate Planning Forum of Tulsa and the Planned Giving Council of Oklahoma. She is a nationwide frequent speaker, lecturing both to continuing education professionals and lay groups. She is licensed to practice in Oklahoma, Tennessee, and Georgia. In addition to all the courts in each of these three states, Ms. Allison is licensed to practice before the U.S. Tax Court, the 4th, 5th, 6th, 10th, and 11th Circuit Courts of Appeal and the United States Supreme Court. Ms. Allison also currently serves on the St. John Medical Center Foundation Community Liaison Board, the Volunteers of America Board of Directors, the Advisory Board to Tulsa University Genave King Rogers Business Law Center, the Planned Giving Advisory Committee for the Tulsa Library Trust and the Oklahoma Bar Association Estate Planning, Probate and Trust Section Board.

*The Allison Firm*

Counselors and Attorneys-at-Law

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Elder Friendly Certified by the Tulsa Area Agency on Aging.

*trust ~ probate ~ testamentary trusts  
~ prenuptial agreements ~ power of  
attorney ~ health care directive ~  
revocable trust ~ asset protection ~  
family limited partnerships ~ irrevocable trust ~ power of appointment  
~ divorce tax planning ~ generation skipping tax planning ~ charitable transactions ~ pension distri-*

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*bution planning ~ special needs  
trust ~ buy sell agreements ~ busi-  
ness succession planning ~ living  
will ~ post mortem planning ~  
death tax return ~ memorandum of  
trust ~ assignment ~ death preser-  
vation trusts ~ dynasty trust ~ ir-  
revocable life insurance trust ~ per-  
sonal residence trusts ~ contingent  
disposition ~ qualified domestic  
trust ~ ethical wills ~ marital de-  
duction trusts ~ charitable remain-  
der trusts ~ asset transfers ~ age 21  
trusts ~ QTIP trusts ~ joint tenancy*

## *The Allison Firm*

### Attorneys-at-Law

*The Allison Firm* is an AV rated firm that limits its practice to the areas of estate planning, post mortem planning and probate, pension distribution planning, business succession planning, all facets of charitable transactions, domestic relations taxation (including premarital contracts), estate and gift taxation (including state and federal audits), tax, trust and will litigation and the legal ethics associated with these practice areas. When performing services for clients in states in which a member of the firm is not licensed, *The Allison Firm* associates with a local firm to perform that state law portion of the client representation.

### What We Do:

- Estate Planning
- Family Wealth Preservation Trusts
- QTIP Trusts
- Age 21 Trusts
- Dynasty Trusts
- Incentive Trusts
- Spendthrift Trusts
- Revocable Trusts
- Irrevocable Trusts
- Descendants Trusts
- Testamentary Trusts
- Special Needs Trusts
- Reversionary Trusts
- Discretionary Trusts
- Memorandum of Trust

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- Matching Grant Trusts
- Marital Deduction Trusts
- Qualified Domestic Trusts
- Beneficiary Controlled Trusts
- Electing Small Business Trusts
- Qualified Subchapter S Trusts
- Grantor Retained Unitrusts
- Grantor Retained Annuity Trusts
- Asset Protection Planning
- Personal Residence Trusts
- Qualified Personal Residence Trusts
- Irrevocable Life Insurance Trusts
- Intentionally Defective Grantor Trusts
- Family Limited Liability Companies
- Family Limited Partnerships
- Charitable Lead Trusts
- Charitable Planning
- Charitable Gift Annuity
- Charitable Transactions
- Charitable Remainder Unitrusts
- Charitable Remainder Annuity Trusts
- Charitable Bargain Sales
- Tax Exempt Organizations
- Ethical Wills
- Living Wills
- Structured Gifts
- Gift Tax Returns
- Generation Skipping Tax Returns
- Federal Estate Tax Returns
- Oklahoma Death Tax Returns
- Tax Litigation
- Defense of Estate, Gift and Generation Skipping Tax Returns
- Retirement Tax Planning
- Divorce Tax Planning
- Generation Skipping Tax Planning
- Pension, IRA, 401(k) Distribution Planning
- Business Succession Planning
- Post Mortem Estate Planning
- Farm and Ranch Estate Planning
- Durable General Powers of Attorney
- Limited Powers of Attorney
- Healthcare Powers of Attorney
- Wills
- Uniform Transfers to Minor Act Gifts
- Prenuptial Agreements
- Buy-Sell Agreements
- Intrafamily Sales

- Intrafamily Loans
- Probate
- Assignments
- Asset Transfers
- Crummey Powers
- Advanced Healthcare Directives
- Exercise of Powers of Appointment
- Self Canceling Installment Notes
- Conservation Easements
- And more...

### Who we are continued:

#### **Anne M. McKinney** *Attorney-at-Law*

Anne M. McKinney has over thirty years of legal and tax experience. She previously served as an Estate and Gift Tax Attorney with the Internal Revenue Service for ten years. Ms. McKinney lectures frequently before professional and civic groups throughout the nation on the subjects of estate planning and taxation. Ms. McKinney graduated from the University of North Carolina School of Law and received her undergraduate degree from Duke University, magna cum laude. She serves as Adjunct Professor of Law in Estate Planning and Wealth Transfer Tax at The University of Tennessee Undergraduate School. She is a member of the American Bar Association. She is licensed to practice in Tennessee and North Carolina. In addition to all the courts in each of these states, Ms. McKinney is licensed to practice before the U.S. Tax Court, the 6th Circuit Court of Appeals and the U.S. Supreme Court.