

Geoff Germane

Shareholder

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801.426.2100

Practice Areas

Business Formation, Structure, and Exit Strategies

Estate Planning

Tax

Languages

Italian

Portuguese

Spanish

Geoff Germane is a member of the firm's Tax section. His focus is on estate, tax, business, and asset protection planning. He advises individuals and business owners on legally sound strategies to protect their assets and reduce or eliminate taxes. He counsels clients on legacy planning to maximize intergenerational wealth and reduce family stress and tension.

Presentations have included: Your Closely Held Business Interest is Worth More than its Worth, and Other Truths from the IRC 2704 Proposed Regulations; Income Tax Basis Planning for Now and Later; What to Expect While You're Expecting… Tax Reform: Things to Know and Do Now; Keeping "Success" in Business Succession: Key Considerations in Planning for the Business Owner, Beyond Plain Vanilla: Unique Tax and Financial Planning Opportunities with Charitable Trusts; Program-Related Investments and L3Cs: An Underutilized Tool for Private Foundations and the Key to the Toolshed? Mr. Germane is a Distinguished Faculty member for Lorman Education Services. His most recent webinar was The Three-Edged Sword of Discretion: Designing Discretionary Distribution Standards to Protect the Settlor, the Beneficiary and the Trustee.

Mr. Germane is certified as an Accredited Estate Planner® with the National Association of Estate Planners and Councils and as an Estate Planning Law Specialist with the Estate Law Specialist Board.

Education

Brigham Young University J. Reuben Clark Law School, JD, *cum laude*
- National Order of the Barristers

Brigham Young University Marriott School of Management, BS, Accounting

Honors & Awards

- Accredited Estate Planner
- Estate Planning Law Specialist
- 2014, Utah Valley Q magazine 30 in their 30s (30 successful executives in their 30s) honoree
- Utah Legal Elite: Estate Planning (2016, 2018-2021)

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Admissions & Affiliations

Bar Admissions: California
Utah

Affiliations:

Utah Valley University Gift Planning Advisory Board

Board Member, Utah Valley Estate Planning Council, President (2012)

Board of Directors, BYU Management Society

Salt Lake Estate Planning Council

Adjunct Professor in Legal Studies Department at Utah Valley University

Adjunct Professor in Business Law at BYU Marriott School

American Bar Association

San Diego County Bar Association

Utah Bar Association

- Tax Section
- Estate Planning Section
- Nonprofit Section
- Business Law Section

J. Reuben Clark Law Society