Steve Tackett's practice covers all aspects of an active estate planning, probate, collaborative law, mediation, and tax law practice. Mr. Tackett's extensive estate planning practice involves the design and implementation of traditional and non-traditional estate plans for both U.S. and non-U.S. clients of the firm, including the use of revocable or irrevocable trusts, testamentary and lifetime gift planning, marital property agreements, life insurance and life insurance trusts, non-profit corporations and charitable trusts and private foundations, as well as coordination and disposition of non-probate assets such as contractual benefits held in qualified plans or individual retirement accounts (IRAs), and business succession planning involving the use of corporations, general or limited partnerships, and limited liability companies.

Mr. Tackett's probate practice includes the probate of Wills and the determination of heirship of decedents dying without Wills. Mr. Tackett is highly experienced in the judicial and non-judicial severance of trusts, in the judicial construction, reformation, modification, and termination of trusts, and in the representation of Executors, Trustees, and beneficiaries and distributees in the administration, settlement, and distribution of estates or trusts. Mr. Tackett serves as a Qualified Impartial Third Party or Mediator in the private or court-referred mediation or arbitration of disputes involving estates, probates, trusts, marital property disputes, charitable organizations, and estate, gift, and generation-skipping transfer tax issues. Mr. Tackett also handles disputed trust and estate matters in a collaborative law format. Mr. Tackett's tax practice includes the representation of clients with tax controversies pending before the Internal Revenue Service and state tax agencies. As both an attorney in private practice and as a former Estate and Gift Tax Attorney with the Internal Revenue Service, Mr. Tackett has substantial experience in the preparation, examination, and appeal of federal estate and gift tax returns, and state and federal generation-skipping transfer tax returns.

Education

The University of Texas School of Law (J.D., 1971)
- Director, Texas Legal Research Board

The University of Texas at Austin (B.A., Government, 1968)

Professional Affiliations and Honors

Board Certified, Estate Planning and Probate Law (Texas Board of Legal Specialization)
Society of Trust and Estate Practitioners (STEP)
American College of Trust and Estate Counsel (ACTEC), Fellow
American Bar Association
- Real Property, Probate and Trust Law Section
- Dispute Resolution Section
- Business Law Section
- Taxation Section

State Bar of Texas
- Real Estate, Probate, and Trust Law Section
- Alternative Dispute Resolution Section
- Collaborative Law Section
- Business Law Section
- Taxation Section

Austin Bar Association
- Estate Planning and Probate Law Section
  - Past Chair
- Business, Corporation & Taxation Section
- Board of Directors, 1998-1999

Admitted United States Tax Court, 1985
Texas Academy of Probate and Trust Lawyers, Fellow
Texas Bar Foundation, Life Fellow
College of the State Bar of Texas
Travis County Bar Foundation, Founding Fellow
Past President and Member, Estate Planning Council of Central Texas
International Academy of Collaborative Professionals
Collaborative Law Institute of Texas
Court Qualified Impartial Third Party (Mediator)
AV® Preeminent™ Peer Review Rated lawyer (Martindale-Hubbell)
Listed in America's Registry of Outstanding Professionals, 2002-2003
Listed in *The Best Lawyers in America* and in *The Best Lawyers in Texas*
Texas Super Lawyer (every year since its inception in 2003)
Texas Monthly and *Law & Politics* magazines

Professional Presentations (Selected)

"Trust Decanting: Balancing Its Usefulness Against Its Perils," Austin Tax Study Group (Austin, Texas; February 2012)

"IRS Procedures for Examinations, Appeals, and Trials – Looking Back From the Outside," Annual Advanced Estate Planning & Probate Course, State Bar of Texas (San Antonio, Texas; June 2010)

"2009 Estate Planning Workshop," (Panelist) 57th Annual Taxation Conference, University of Texas (Austin, Texas; December 2009)

"Examinations of Federal Estate Tax Returns and Appeals," 31st Annual Advanced Estate Planning & Probate Course, State Bar of Texas (San Antonio, Texas; June 2007)

"Use of ADR Procedures in Estate Planning, Probate, and Trust Administration," 19th Annual Probate and Estate Planning Seminar, Austin Bar Association (Austin, Texas; April 2005)

"ADR Provisions in Estate Planning Documents," 15th Annual Advanced Drafting Estate Planning and Probate Course 2004, State Bar of Texas (League City, Texas; November 2004)

"Anticipating Change," The Advanced Estate Planning Strategies Course 2003, State Bar of Texas (Las Vegas, Nevada; April 2003)

"Audit Roulette: Round and Round We Go," The 25th Annual Advanced Estate Planning and Probate Course, State Bar of Texas (Houston, Texas; June 2001)

“Generation-Skipping Tax for Dummies,” The 14th Annual Probate and Estate Planning Seminar, Travis County Bar Association (Austin, Texas; March 2000)

“Web Searches for Dummies—Web Sites for Estate Planners,” The 13th Annual Wills and Probate Institute, South Texas College of Law (Houston, Texas; September 1999)

“Internet Resources and Website Information for Estate Planners,” The 23rd Annual Advanced Estate Planning and Probate Course, State Bar of Texas (June 1999)

“Trusts,” Strategies for Building a Successful Estate Planning Practice Conference, State Bar of Texas (December 1998)

“Advanced Estate Planning Techniques,” The 12th Annual Wills and Probate Institute, South Texas College of Law (Houston, Texas; September 1998)

“Estate Planning for Non-Traditional Families,” The 21st Annual Advanced Estate Planning and Probate Course, State Bar of Texas (June 1997)

“Hot Button Audit Issues in Estate and Gift Tax,” Advanced Estate and Gift Tax Planning Conference, Texas Society of Certified Public Accountants, Austin Chapter (December 1996)

“Estate Planning For Non-Traditional Families,” The 10th Annual Wills and Probate Institute, South Texas College of Law (Houston, Texas; September 1996)

“Fiduciary Compensation and Investments,” The 8th Annual Probate and Estate Planning Seminar, Travis County Bar Association (Austin, Texas; March 1994)

“Living Trusts,” The 7th Annual Wills and Probate Institute, South Texas College of Law (Houston, Texas; September 1993)

“Fiduciary Compensation,” The 17th Annual Advanced Estate Planning and Probate Course, State Bar of Texas (June 1993)

“How to Survive an Estate Tax Audit,” The 5th Annual Wills and Probate Institute, South Texas College of Law (Houston, Texas; September 1991)

“Preparing the Federal Estate and Gift Tax Returns Against Possible IRS Audit,” The 30th Annual Institute on Wills and Probate, Southwestern Legal Foundation (May 1991)

“Anticipating and Defending Fiduciary Litigation,” The 14th Annual Advanced Estate Planning and Probate Course, State Bar of Texas (June 1990)

“Prime Estate and Gift Tax Issues in IRS Audits and Litigation,” Advanced Estate and Gift Tax Planning Conference, Texas Society of Certified Public Accountants, Austin Chapter (December 1989)

"Audit Federal Estate Tax Returns," The 28th Annual Tax Seminar, Texas Society of Certified Public Accountants, Corpus Christi Chapter (October 1985)

"Multi-Party Accounts Under Chapter XI of the Texas Probate Code," The 9th Annual Advanced Estate Planning and Probate Course, State Bar of Texas (June 1985)

"Handling Estate and Gift Tax Audits," The 7th Annual Advanced Estate Planning and Probate Course, State Bar of Texas (March 1983)

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