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WHAT I KNOW

High net worth individuals have an ever-growing array of options for managing and maximizing their wealth through investments and estate plans. As personal and family needs change, and the tax landscape becomes more complex, it makes having technical expertise, resources and personalized service more important than ever.

I also love working with public and private charities: assisting with obtaining tax exempt status, governance within the confines of exempt status and termination of status. At the end of the day, I assume responsibility for my clients' tax planning by looking forward, rather than just preparing tax returns, so that I maximize value and minimize taxes. I tailor my style to the client, instilling confidence in them that their estate plan is current and they are not paying more than their share of taxes.

CLIENT SUCCESSES

Over the years I have done creative estate planning; navigated complicated estate planning structures and adapted estate plans to keep up with tax laws; conducted pre-transaction collaboration for business owners selling or gifting business interests; designed estate plans for private equity fund managers; negotiated successful outcomes during income, estate and gift tax audits; and performed inbound/outbound transaction planning and exit tax planning for international clients.

ADDITIONAL INSIGHT

How has your professional experience shaped your thinking about your area of expertise?

My concentration on estate planning came from my early legal career. Estate and gift taxes are complex and many CPAs don't learn these concepts when they get their accounting degree. It's a difficult area to learn "on-the-job," so CPAs don't have a great depth of knowledge in this area. This deep subject matter knowledge, along with the fact that I've been practicing in this area for almost 25 years, sets me apart.

How does entrepreneurial thinking play a role in your guidance to clients?

Entrepreneurs are a unique breed (I can say this since I consider myself one and am also married to one). They think differently - their focus is always centered on growing or selling their business. As a result, I often will play quarterback, collaborating with other professionals to keep the estate planning process moving. I need to be attuned to what's happening in the business, see challenges and opportunities before an event happens, so that I can craft a plan accordingly, whether it's income or estate tax focused.

Profile

Practice Group: Individual Tax & Advisory

Major Practice Area: High Net Worth Individuals, including C level executives, Private Equity Fund Managers, Foreign Executives & Expatriates, Cross-Border Taxation Activities, Not-For-Profits (Public and Private)

Professional & Community Involvement: American Institute of Certified Public Accountants
Texas Society of Certified Public Accountants

Collaborative Law Institute of Texas

Dallas Estate Planning Association (Former Board of Governors)

State Bar of Texas

Dallas Bar Association

Arthritis Foundation - Texas Chapter (Finance Committee)

Parkland Foundation Planned Giving Council

Communities Foundation of Texas Advisory Board

YMCA Dallas - Foundation Board of Trustees

University of Texas at Dallas - Gift Planning Advisory Council

Professional Background: Travis Wolff, LLP

Lane Gorman Trubitt, PLLC

Education: University of Texas School of Law

University of Texas at Dallas (Master of Science, Accounting)

University of Texas at Austin (Bachelor of Arts, English)

Credentials and Certifications: Certified Public Accountant (CPA), Texas

Licensed to practice law, State Bar of Texas; Admitted to practice, U.S. District Court - Northern District of Texas and U.S. Court of Appeals - Fifth Circuit

Awards and Recognition: Recipient of a "top ten" score on the Uniform CPA exam in Texas and was invited to speak at her investiture ceremony.