RB REES BROOME, PC

ATTORNEYS AT LAW

John F. Boland

Shareholder

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Mr. Boland has practiced with Rees Broome, PC since 1976, concentrating in business, taxation and related matters, including estate dispute resolution and litigation.

Practice Focus

Practice focuses on all aspects of estates and wealth transfer, including transfer planning, estate administration and estate dispute and fiduciary litigation.

Provides a wide range of tax planning and advice for businesses, individuals and fiduciaries in operational business matters of all kinds, including:

- Estate planning for individuals and business succession planning
- Estate administration for trusts and decedents' estates
- Litigation involving disputed estates

Experienced in commercial real estate transactions, including representation as lender and borrower counsel in business financial transactions.

Representative Experience

Taxation and Estate/Wealth Transfer Planning: experienced in all phases of tax planning and wealth transfer, specifically:

- Advises and assists clients and their other financial advisors with estates of all sizes in planning for tax minimized transactions
- Represents clients before the Internal Revenue Service in tax audits and disputes
- Assists clients in planning to preserve, use and ultimately to transfer assets to intended beneficiaries while minimizing transfer taxes and avoiding probate when appropriate, including business succession planning
- Assists high net worth individuals in leveraging transfer tax exemptions for the benefit of their family units, including charitable gifting planning for interested individuals
- Represents estate fiduciaries and beneficiaries in facilitating probate and trust administration and in accomplishing post death tax planning to minimize estate taxes, including planning for proper preparation and reporting of transactions and assets in gift and estate tax returns

Estate Dispute Resolution and Litigation

Represents fiduciaries and beneficiaries in estate and trust disputes by and among beneficiaries in a variety of issues that arise in the administration of estates and trusts and in determining the proper beneficiaries of the assets. Cases have included:

- Represented minor son of decedent in trial court in action by fourth wife to set aside decedent's will and on appeal by widow
- Represented husband of decedent in trial court in action to remove wife's brother as trustee of a business trust established by decedent's mother and to establish client's right in the trust that operated multi-million dollar business, and on appeal by brother
- Represented bank as trustee of several trusts in which disputes arose with or among beneficiaries of the trusts
- Represented adult children of decedent in actions to establish their rights against claims and actions by father's widow
- Represented widow of decedent against children from husband's prior marriages in actions to determine proper will of decedent and to determine widow's "augmented estate" elective share
- Represented adult son in contested action to establish proper guardian of elderly parent whose physical and mental condition had become severely deteriorated while under control of another adult child
- Represented attorneys-in-fact for elderly client in actions to recover over two million dollars from "charitable" organization to which the client had "loaned" the funds while not competent during a manic episode
- Represented various fiduciaries of estates and trusts in the administration of assets to anticipate and avoid possible claims

Business Representation

Represents a variety of businesses and professional and civic involvement associations in dealing with legal matters and issues that arise in the operation of the business, including contract negotiation and preparation, employment issues, employee benefits and agreements among owners.

Education and Background

- J.D (with honors), George Washington University National Law Center (1975)
- B.A. (with honors), Wheaton College

Bar/Court Admissions

- Virginia (1975)
- District of Columbia Court of Appeals (1976)
- U.S. District Court for the District of Columbia (1976)
- U.S. District Court for the Eastern District of Virginia (1978)
- U.S. Tax Court (1980)

Professional and Civic Involvement

- Member, Virginia State Bar Association
- Member, Fairfax Bar Association
- Member, District of Columbia Bar Association
- Adjunct Instructor, George Washington University Paralegal Program (1978-1983)
- Member, Fairfax County, Virginia, Architecture Review Board for Historic Districts (1992-present)