ALSTON & BIRD

Margaret Ward Scott

Partner

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A Fellow of the American College of Trusts and Estates Counsel, Margaret serves on the boards of many legal committees and nonprofit foundations. She leverages her network and her command of fiduciary law to provide advice on estate planning, charitable planning, and exempt organizations.

Margaret W. Scott concentrates her practice on estate planning, fiduciary and tax litigation, estate settlement, trust administration, charitable planning, charitable solicitation law, and exempt organizations. Margaret provides individuals, families, and institutional and individual trustees with advice on tax issues and estate planning strategies. She frequently helps trustees, executors, guardians, and beneficiaries resolve a broad range of estate and trust disputes, many of which involve complex and sophisticated legal and tax issues.

She serves as a trustee of the Charles Loridans Foundation and the secretary/treasurer of the Vasser Woolley Foundation. She is the chair elect of the Fiduciary Law Section of the State Bar of Georgia, the president of the Atlanta Estate Planning Council, past chair of the Nonprofit Law Section of the State Bar of Georgia and serves on the board of the Chastain Park Conservancy and Emory University Board of Visitors. Margaret founded Alston & Bird's Wills Program for emergency services personnel and indigent Atlantans and annually provides wills trainings for volunteer attorneys. Margaret was recognized by *The Best Lawyers in America©* as "Lawyer of the Year" for 2022.

Margaret earned her B.A. from Duke University in 1996 and her J.D., with honors, from the Emory University School of Law in 2003. Before law school, Margaret worked as a speechwriter and policy analyst for the U.S. Department of Education in Washington, D.C.

Representative Experience

- Advocating for numerous clients, including financial institutions and individuals involved in contentious estate or trust-related litigation, including breach of fiduciary duty actions, fraud claims, will caveats, will and trust construction cases, and actions for removal of trustees and executors.
- Assisting multiple clients by providing advice on tax-efficient estate and charitable planning and routinely guides individual and corporate fiduciaries in navigating complex estate and trust administration matters.
- Counseled multiple clients on the regulation of charitable entities' cause marketing and partnerships with charitable organizations.
- Obtained tax-exempt status from the Internal Revenue Service for employee disaster relief funds for a number of large nationwide corporations.

Publications & Presentations

Publications

- "CLTs and CRTs: Benevolence that Is Good for the Bloodline," *Estate Planning*, Thomson Reuters, Vol. 49, No. 1, January 2022.
- "Insight: Transfer Tax and Estate Planning Considerations for Clients with Cryptoassets (Part 2)," *Bloomberg Tax,* January 22, 2020.

- "Insight: Transfer Tax and Estate Planning Considerations for Clients with Cryptoassets (Part 1)," *Bloomberg Tax,* January 21, 2020.
- "Navigating Around the Death Penalty—Private Foundation Terminations," *Taxation of Exempts*, January/February 2015.
- "Capital Gymnastics – A Cautionary IRS Message to Booster Clubs," *Taxation of Exempts*, March/April 2014.

Presentations

- "Benevolence vs. Bloodline: Creative Solutions Involving Charitable Lead Trusts and Charitable Remainder Trusts," Georgia Planned Giving Council Annual Membership Meeting, Atlanta, GA, November 10, 2021.
- "Benevolence vs. Bloodline: Creative Solutions Involving Charitable Lead Trusts and Charitable Remainder Trusts," 54th Annual Heckerling Institute on Estate Planning, Orlando, FL, January 13 - 17, 2020.
- "Opening Remarks," 54th Annual State Bar of Georgia Fiduciary Law Institute, Fernandina Beach, FL, July 11-13, 2019.
- "Intersection of Estate Planning and M&A Transactions," 54th Annual State Bar of Georgia Fiduciary Law Institute, Fernandina Beach, FL, July 11-13, 2019.
- "Estate Planning for Married Couples with Less Than $22M: Simple Right?" 53rd Annual Fiduciary Law Institute, St. Simons Island, GA, July 12–14, 2018.
- National Mortgage Servicing Conference & Expo 2018, Grapevine, TX, February 6-9, 2018 .

Professional & Community Engagement

- American College of Trust and Estate Counsel, fellow
- Atlanta Bar Association Estate Planning and Probate Section
- CFA Institute's Claritas® Investment Certificate
- Chastain Park Conservancy, board of directors
- Charles Loridans Foundation, trustee
- Alston & Bird Pro Bono Committee
- Mark and Evelyn Trammell Foundation Inc., trustee

Accolades

- *The Best Lawyers in America©* Trusts & Estates, since 2018
- Chambers HNW, Georgia band 2
- Selected to the Georgia Rising Stars list by Super Lawyers magazine
- Recognized by the Emory Public Interest Committee (EPIC) with its 2018 "Outstanding Leadership in the Public Interest Award"
- Atlanta Legal Aid "Pro Bono Star" award recipient

Education

- Emory University (J.D., 2003)
- Duke University (B.A., 1996)

Admitted to Practice

- Georgia

Related Services

Wealth Planning | Exempt Organizations | Tax | Family Office | Federal & International Tax