GRANT
FRIDKIN PA
PEARSON

ATTORNEYS AND
COUNSELORS AT LAW

Marcie A. Charles
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Professional Experience:

Marcie Charles joined the firm in 2019 and has practiced law in Southwest Florida since 2014. She has a Master of Laws degree in Taxation. Marcie focuses her practice in the areas of estate planning, estate and trust administration, business succession planning, and tax planning, and has represented clients before the IRS. Marcie also has extensive experience in corporate tax planning having served as an attorney advisor with the IRS Office of Associate Chief Counsel (Corporate) in Washington, D.C. and advisor to Fortune 500 companies when she worked in two Big Four public accounting firms.

Education

Georgetown University Law Center, LL.M. (Taxation), *with distinction*, 2009
New England School of Law, J.D., *cum laude*, 2006
Providence College, B.A., *cum laude*, 1997

Bar Admissions

Florida
Massachusetts

Professional Involvement

Collier County Bar Association
Collier County Women's Bar Association
Lee County Bar Association
Florida Bar Association (Tax Law, Business Law, and Real Property, Probate & Trust Law sections)
Estate Planning Council of Naples, Director

Community Involvement

Community Foundation of Collier County, Professional Advisor Council
Naples Zoo at Caribbean Gardens, Planned Giving Committee
Shelter for Abused Women and Children, NextGen Committee

Practice Area: Trusts & Estates

Areas of Concentration:

Representing individuals in their estate planning
Representing fiduciaries in the administration of estates and trusts
Advising clients on tax planning to minimize estate, gift and generation-skipping transfer taxes
Preparation of federal estate and gift tax returns
Representing clients before the Internal Revenue Service

Attorney Publications/Presentations:

- Panelist: Tax Cuts and Jobs Act, Explained (Key West, 2018)
- **Bloomberg BNA**, Presenter: Consolidated Return Issues in Acquisitions and Dispositions (Chicago, 2013)
- **American Bar Association**, Panelist Section of Taxation Fall Meeting: A Primer on Consolidated Return Basics: Membership and Group Continuance (Boston, 2012)
- Executive Enterprise Institute, Presenter: Tax Strategies for Mergers and Acquisitions with Consolidated Returns (Chicago, 2012)
- American Bar Association, Panelist Section of Taxation Fall Meeting: The SRLY Rules: Can They Be Simplified? (Denver, 2011)
- **Georgetown University Law Center**, Adjunct Faculty: Tax Research and Writing (Washington DC, 2011)
- Strafford Publications, Presenter: Federal Consolidated Return Regulations for Corporate Taxpayers (Webinar, 2011)
- American Bar Association, Panelist Section of Taxation Midyear Meeting: Current Developments in Consolidated Returns (Boca Raton, 2011)
- **Federal Bar Association**, Panelist Annual Insurance Tax Seminar: Primer on Life/Nonlife Consolidation (Washington DC, 2010)