Joseph R. Marion, III

Shareholder, Providence, RI

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PRACTICE AREAS

Trusts & Estates

Business & Corporate

Tax

EDUCATION

Roger Williams University School of Law (J.D., 1998)

University of Rhode Island (B.A., high distinction, 1995)

ADMISSIONS

Rhode Island

Massachusetts

New York

U.S. District Court, District of Rhode Island

U.S. District Court, District of Massachusetts

U.S. Tax Court

OVERVIEW

An experienced estate planning attorney, Joseph is a frequent lecturer for the Boston Bar Association and the Rhode Island Bar Association on estate and long-term care planning issues and land conservation planning. His areas of practice include estate and income tax planning, business succession planning, land conservation planning, long-term care planning, probate and trust administration, special needs planning and real estate conveyancing.

Joseph often counsels clients on estate and income tax savings techniques including the most tax efficient ways which to transfer wealth and family businesses through multiple family generations. He also helps families preserve assets through advance planning for their long-term care needs. He frequently represents trustees and banks in their service as fiduciaries in the settlement of complex estates and beneficiary disputes.

REPRESENTATIVE MATTERS

- Joseph has helped business owners transition their business interests and wealth to the next generation, achieving parity among beneficiaries while at the same time helping both parents and children reduce income and estate tax.
- Joseph recently assisted the beneficiaries of an estate with the liquidation and sale of their family business.
- Joseph has assisted countless families with their estate, special needs and long-term care planning, helping them fine tune their plans to reach their goals and preserve assets.
- Joseph has handled the reformation of numerous trusts and removal and replacement of trustees before the court system and under the new Rhode Island decanting statute to achieve the intended result of the drafter of the

trust for estate and long-term care planning purposes.
- Joseph has represented numerous landowners in the negotiation of their land conservation easement planning. He has handled several of the largest land conservation acquisitions in Rhode Island.

SEMINARS / PUBLICATIONS

- Wills and Trusts 101, National Business Institute, June, 2019.
- Rhode Island Professionals Day, Speaker, Partnering with a Corporate Fiduciary, sponsored by The Financial Planning Association of R.I., The R.I. Chapter of the Society of Financial Service Professionals and the National Association of Insurance and Financial Advisors, May 10, 2019.
- Estate Planning Update, AP&S Seminar, April, 2019.
- Marcum Accountants and Advisors, Speaker for Year End Tax Seminar, November, 2018.
- Lifespan Planned Giving Society, Featured Presenter, May 2018.
- Sole presenter, The Future of Special Needs Trusts Under the Affordable Care Act, NBI, November, 2015.
- Advanced Family Law, NBI, September 20, 2014.
- Top Estate Planning Techniques, NBI, June 6, 2013.
- Financial Planning Association of Rhode Island- Planning for Special Needs Beneficiaries, April 9, 2013.
- Donors Remorse- Reversing 2012 Gifts, Boston Bar Association, February 22, 2013.
- Estate Planning Update, Rhode Island Society of CPAs, January 19, 2012.
- Sophisticated Probate Strategies, NBI, December 9, 2012.
- Moderator, 2011 Rhode Island Estate Planning and Elder Law: A Review of New Federal and State Estate Tax and Medicaid Qualification Changes, Rhode Island Bar Association Annual Meeting, June 8, 2011.
- “Don't let Taxes Decide your Business' Future,” Providence Business News, June 15, 2009.
- “Long-term Care Planning Essential in Tough Times,” Providence Business News, November 17, 2008.
- Rhode Island Forest Conservator’s Organization, Inc, Seminar, December 12, 2011.
- Demystifying Asset Protection Vehicles, NBI, April 17, 2008.

HONORS

- Selected by his peers for inclusion in *The Best Lawyers in America®* in the field of Trust & Estates in 2013-2020.
- Professional Excellence in the Law, Wills Trusts and Estates, *Rhode Island Monthly* 2019.
- Recognized as a “JD Supra Top Author” in the JD Supra 2017 and 2018 Readers’ Choice Awards.
- Named by Rhode Island Monthly and Rhode Island Business Quarterly as a “2011-2014 Five Star Wealth Manager.”
- Selected as a 2014-2018 Rhode Island *Super Lawyer* and as a Rhode Island *Rising Star* 2011-2013 by the publishers of *Super Lawyers.*

PROFESSIONAL AFFILIATIONS

- National Association of Elder Law Attorneys – Member of Massachusetts Chapter.
- Professional Affiliate Member (PAM), Rhode Island Society of Certified Public Accountants.
- Member, Rhode Island Bar Association.
- Member, Boston Bar Association.
- Member, New York Bar Association.
- Member, Rhode Island Bar Committee on Probate and Trusts.
- Member, Rhode Island Estate Planning Council.
- Member, Past Member Rhode Island Foundation, Professional Advisory Council.
- Past Member, Board of Governors, Catholic Foundation of Rhode Island.
- Past Member, University of Rhode Island Alumni Association, Board of Directors, Finance Committee.

IN THE COMMUNITY

- Rhode Island Planned Giving Council.
- Past Member, Board of Directors, The James L. Maher Center.
- Little Compton Community Center, Board of Directors (1997-2007).
- Little Compton Agricultural Conservancy Trust, Vice Chairperson (1998-2007).