



David G. Henry

Director

412-288-1849

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Practice Areas

Estates and Trusts

A Director in the Estates and Trusts Group, Dave concentrates his practice on estate planning, wealth management, and estate administration. As a former certified public accountant, Dave has the knowledge, experience and ability to counsel clients on tax minimization strategies with respect to their estate planning, and provides representation to taxpayers in disputes with the IRS with respect to estate and gift tax issues. He also works with family businesses in transferring ownership between generations, and structuring start-up businesses.

Dave has experience with most estate planning techniques including:

- Dynasty trusts
- Intentionally defective grantor trusts and GRATs
- Family limited partnerships
- Revocable and irrevocable trusts

Bar Admissions

- Commonwealth of Pennsylvania
- United States Tax Court

Education

- Duquesne University School of Law, J.D.
Cum Laude; Participated in Law Review
- Indiana University of Pennsylvania, B.S.
Summa Cum Laude

Awards/Recognition

- BV® Rated, Martindale-Hubbell Peer Review Rating System

Professional Affiliations

- Member, Allegheny County Bar Association
- Member, Pennsylvania Institute of Certified Public Accountants
- Member, American Institute of Certified Public Accountants



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page 2

Representative Engagements

- Represented the owners of a large manufacturing company in the transfer of all stock into related dynasty trusts.
- Assisted many clients form and operate intentionally defective grantor trusts and GRATs to transfer ownership between generations.
- Assisted many trustees in the termination or reformation of irrevocable trusts following the occurrence of unanticipated events.
- Assisted many clients create spendthrift trusts to be the beneficiaries of their retirement plan assets.
- Represented a large insurance agency in the acquisition of multiple competitors.
- Assisted in the amicable separation and distribution of the assets of a marital estate valued at over \$50M.