

Presentation Outline for April 22, 2010 Dinner Meeting:

- Trust and estate tax law changes
- How to use a trust for estate planning purposes to protect assets
- Myths about long term care

Speaker Bio:

Bill Alexander is a native of Kannapolis, North Carolina and graduated from Davidson College (BA, 1973), and Wake Forest University School of Law (JD, 1976). He now manages an estate and business planning practice as the founding partner of W.G. Alexander & Associates, PLLC in Raleigh, North Carolina.

Bill has practiced law for 33 years and maintains an ‘A-v’ attorney rating* by Martindale-Hubbell. He works closely with business and family clients on wealth transfer and asset protection, Medicaid strategies and qualification, counseling for wills and trusts, and the handling of estate administration and probate.

Bill is a member of the Estate Planning Section and Elder Law Section of the NC Bar Association. He was a “Charter Member” of the National Network of Estate Planning Attorneys and is active with Wealthcounsel, WealthCounsel Advisors Forum, ElderCounsel, NAELA, and the Mid-South Network of Estate Planning Attorneys. He regularly provides continuing education for Attorneys, CPA’s, financial advisors and insurance agents for Estate and Business Planning.

Bill is a former Member of the North Carolina House of Representatives. He retired in 2004 from the North Carolina Air National Guard with the rank of Colonel. Bill was the top legal officer in the N.C. Air Guard and in his last two assignments for the Guard, he taught as an adjunct faculty member at the USAF Judge Advocate General School and served as the ANG Assistant to the Air Force Special Operations Command. Bill was the Editor in Chief of the legal training course for the United Nations Department of Peacekeeping Operations and managed the U.S. Air Force Civil Affairs program; he continues to act as a Subject Matter Expert for the UN in Human Rights and Humanitarian Law.

Bill was awarded the Legion of Merit and the Distinguished Service Medal; he was recognized by the Governor of North Carolina for his service to the state by induction into “The Order of the Long Leaf Pine.” Bill is married with two sons. He is an active member and Elder at First Presbyterian Church of Raleigh.