COATS | ROSE
A PROFESSIONAL CORPORATION

# Sol S. Reifer

*Director*

14755 Preston Road, Suite 600
Dallas, Texas 75254

Phone: 972.788.1600
Fax: 972.702.0662
sreifer@coatsrose.com

Sol is a Director in the Dallas office, with over 40 years' experience in probate administration, trusts and estate planning law, as well as, asset protection. He is involved in structuring family estates to maximize the amount of assets that pass to succeeding generations through the use of various types of trusts and business entities that will minimize the amount of shrinkage due to "transfer taxes" pertaining to such transfers (i.e, the estate, gift and generation skipping taxes). His practice includes legal consultation and structuring of business and family investment entities to protect key family assets from litigation risks. He counsels clients that estate planning done correctly is multi-generational. His philosophy is that estate planning is a lifetime "process" of planning for the accumulation, conservation and distribution of wealth between the generations.

Sol has received the designation as an Accredited Estate Planner from the National Association of Estate Planners, 1995, and was selected to "5-Star" Wealth Manager in 2010-2020 and to the Texas Super Lawyers list in 2011-2021.

## *Admitted*

- Texas, 1980
- U.S. Tax Court

## *Education*

- LL.M. Estate Planning, 1982, University of Miami in Miami, Florida
- J.D., 1980, Southwestern University
- B.A., cum laude, 1974, The University of Texas

## *Affiliations*

- Dallas Bar Association
- American Bar Association
- Dallas Estate Planning Council
- National Association of Estate Planners

## *Honors and Awards*

- Accredited Estate Planner

- Named to the Texas Super Lawyer list in the area of Trusts and Estates, 2011-2021
- Selected as a "5 Star" Wealth Manager, 2010-2020

## *Publications*

- "Best Practices for Cryptocurrency in Estate Planning," Dallas Bar Association Newsletter, Real Property Probate and Trust Issue (December 2021)
- "Are Living Trusts for You," T.A.L.S. Docket (March 1991)
- "Structural Considerations for a FSC," Prentice-Hall, U.S. Taxation of International Operations (October 9, 1985)
- "Choosing a FSC Jurisdiction," Prentice-Hall, U.S. Taxation of International Operations (September 25, 1985)
- "The Foreign Sales Corporation-An Analysis of Its Impact, Attributes and Planning Opportunities after the 1984 Tax Reform Act," Prentice-Hall, Tax Ideas (Fall 1985)
- "Section 401(k) Plans-An Alternative to an IRA," Warren, Gorham & Lamont, The Review of Taxation of Individuals (Spring 1985)
- "Auld Lang Syne for Professional Personal Service Corporations," State Bar of Texas, Texas Bar Journal (May 1983)

## *Presentations*

- "Asset Protection and Advanced Estate Planning Strategies for the Professional" UBS (Dallas, Texas)
- "The Future Direction of Estate Planning: 2019" Goldin Peiser & Peiser, CPAs (Dallas, Texas)
- "Fundamentals of Estate Planning," National Active & Retired Federal Employees Association, Dallas Chapter (Dallas, Texas)
- "Estate and Tax Planning in 2013 and Beyond: Planning in the Post –AFTRA Environment," Money Matters with Ken Moraif (Dallas, Houston, Ft. Worth, and Austin, Texas)
- "Estate Planning 101: A Primer," Armor Wealth Management (Dallas, Texas)

## *Activities*

- Estate Planning Instructor, SMU Certificate Program for Financial Planning (2010-present)
- Adjunct Professor in Estate Planning, School of Business, University of Texas-Dallas (2015-2017)
- Estate Planning Instructor, Graduate School of Business at the University of Dallas (1995-2010)

- Estate Planning Instructor, Professional Development Institute at the University of North Texas (May 1993-June 2010)
- Estate Planning Instructor, Southeastern Paralegal Institute (June 1992 – May 1998)
- Judicial Law Clerk for Judge Jack Swink in the Probate Court of Los Angeles (1979)