M. Todd Lewis

Partner

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325 West Main Street
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Lexington, KY 40507

Industries

Finance

Regional & Community Banks

Practice Areas

Wealth Planning & Family Office

Bar Memberships

Kentucky

Todd concentrates his practice in estate planning, probate estate and trust administration, business succession planning, asset protection planning, wealth transfer planning, and charitable giving. He also advises clients on income, estate, gift, and generation-skipping transfer taxation issues.

Todd has experience in drafting and implementation of wills, revocable and irrevocable trusts, installment sales, grantor retained annuity trusts, residence trusts, private family foundations and donor advised funds, and charitable remainder and charitable trusts. He also has experience in planning for distributions from retirement plans and IRAs. Todd frequently works with high-net worth individuals and families, and closely held business owners and has experience planning for their unique situations.

Prior to joining Frost Brown Todd, Todd earned his LL.M. degree in Taxation from the University of Florida-Levin College of Law, where he served as coach of the Tax Moot Court Board. Prior to receiving his LL.M., Todd attended the Charleston School of Law in Charleston, South Carolina, where he served as the Associate Managing Editor of the *Charleston Law Review* and the Associate Justice for the Moot Court Board, and volunteered as a VITA Income Tax Preparer for low-income families in the Charleston area. He received his undergraduate degree in Accountancy from the University of Louisville in 2006.

Other Info About Todd

Education

Charleston School of Law, J.D., 2010

University of Florida, Levin College of Law, LL.M., 2011

University of Louisville, B.S.B.A., Accountancy, 2006

Recognition

Selected for inclusion in *Kentucky Rising Stars®*, 2020-2023

National Tax Moot Court Competition – First Place, 2011 as Coach; Second Runner-Up, 2010 as Competitor

CALI Awards in Federal Income Taxation, Partnership Taxation, Civil Tax Procedure & Litigation Strategy

Michael T. Schexnayder Scholarship Recipient, 2010

Professional Affiliations

Bluegrass Estate Planning Council – Past President, 2017-2018; President, 2016-2017; Vice President, 2015-2016; Secretary, 2014-2015

American Bar Association

Kentucky Bar Association

Fayette County Bar Association

Civic Activities

BGCF 365 – Networking Committee, 2018

VITA – Volunteer Income Tax Assistance

Featured Articles

Strategic Estate Planning Opportunities in a Low Interest Rate Environment

A Break from Tradition: Trust Planning for Wealthy Blended Families

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