Carla L. Lovell

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As an experienced estate planning attorney and business counselor, Carla Lovell understands that the matters she handles involve more than just dollars and cents. Carla’s sophisticated yet practical tax and estate planning, charitable planning, and business succession guidance help individuals, families, and business owners protect a lifetime of hard work and lay the foundation for a secure future. She provides clarity for fiduciaries and beneficiaries who must navigate complex trust and probate administration issues during an already difficult time.

Carla’s practice includes sophisticated estate planning, transfer tax planning, and domestic asset protection planning, as well as special needs trust planning and conservatorships. She believes in empowering her clients with information so they can make informed choices about their futures. Her collaborative approach focuses on developing a holistic understanding of each client’s goals and challenges so she can suggest and implement strategies to achieve the former and address the latter. Clients appreciate Carla’s candor, empathy, and ability to explain complex estate planning concepts in plain English. She has helped countless high-net-worth individuals protect and preserve their assets for retirement and their loved ones.

Carla handles a wide range of probate and estate administration matters. She assists beneficiaries with their interests in trusts and estates and regularly represents executors and trustees in probate and estate and trust administration, ensuring they understand their duties and responsibilities and fulfill their roles in accordance with the law and the governing documents. With deep experience and expansive knowledge of the Tennessee Uniform Trust Code, she assists clients in modifying, decanting, and/or terminating trusts by agreement or by court order.

Carla is one of a very few attorneys in Tennessee who has formed a Tennessee private trust company. Additionally, she advises families regarding the structure, operation, and best practices for private family offices and private family trust companies.

Since many of Carla's clients are business owners, she frequently advises them regarding business structure and assists with real estate and other business transactions. She also counsels nonprofit entities and tax-exempt organizations on business formation, tax exemption qualification and compliance, and governance matters.

After receiving a bachelor's degree with highest honors from the University of Tennessee at Knoxville, where she was a member of Phi Beta Kappa, Carla earned her law degree from Vanderbilt University Law School.

Carla is a Fellow and the Tennessee State Chair of the American College of Trusts and Estate Counsel (ACTEC) and is regularly recognized by her peers for her professional endeavors. The *Chambers USA High Net Worth Guide* has ranked her Band 1 for her work in Private Wealth Law, *Best Lawyers in America*® has recognized her in the area of Trusts & Estates, and *Mid-South Super Lawyers* has named her in the area of Estate Planning and Probate.

Carla is active in several professional, civic, and charitable organizations and regularly speaks to civic and religious groups on estate planning and estate administration issues.

Education

- Vanderbilt University Law School, J.D.
- University of Tennessee at Knoxville, B.A., with highest honors

Admissions

- Tennessee

Recognition

- *Best Lawyers in America*®, Trusts and Estates (2012 – 2026)
- *Chambers USA High Net Worth Guide*, Private Wealth Law (2022 – 2025)
- Martindale-Hubbell®, AV Preeminent Peer Review Rated
- *Mid-South Super Lawyers*, Estate Planning & Probate, Nonprofit Organizations, Tax (2016 – 2024)
- *Nashville Business Journal* "2020 Women of Influence" (Trailblazer)
- *Nashville Business Journal* "Best of the Bar," Tax/ERISA (2020)
- Tennessee Bar Association Harris Gilbert Pro Bono Attorneys of the Year Award (2025)

Publications

- Carla Lovell, **How a Spousal Lifetime Access Trust (SLAT) Can Shield High-Net-Worth Individuals From Estate Tax and Creditor Liability**, Sherrard Roe Blog (July 19, 2022)
- Carla Lovell, **What is a Revocable Trust and Do You Need One?**, Sherrard Roe Blog (December 5, 2019)
- Carla Lovell, **Your Loved One Dies. You're in Charge of Settling Their Estate. What Happens Next?**, Sherrard Roe Blog (November 4, 2019)
- Carla Lovell, **Tennessee Inheritance Tax Repealed – It's Time for an Estate Planning Review**, Sherrard Roe Blog (January 26, 2016)

- Carla Lovell, **Using Tennessee’s Trust Law to Fix Broken Trusts**, Sherrard Roe Blog (September 11, 2014)

Speaking Engagements

- “Prenuptial and Postnuptial Agreements,” Co-Presenter, Nashville Bar Association CLE (September 15, 2020)
- “Private Trust Companies in Tennessee,” Presenter, American College of Trust and Estate Council Southern Region Fellows Meeting (April 26 – 28, 2019)
- “Estate Planning,” Presenter, CapWealth 2019 Spring Women’s Luncheon (April 10, 2019)
- “Demystifying Working with Financial and Estate Planning Professionals: Everything You Ever Wanted to Know But Were Afraid to Ask,” Presenter, Planned Giving Council of Middle Tennessee Luncheon and Program (January 9, 2019)
- “Trust Friendly Tennessee-Utilizing Trusts and Gaining More Flexibility for Estate Planning and Estate Trust Administration,” Presenter, Lincoln Financial Advisors’ WISE Group (Women Inspiring, Supporting and Educating) Luncheon (May 16, 2017)
- “The Intersection of Family Law and Estate Planning,” Presenter, Probate & Estate Planning Conference for Tennessee Attorneys (October 20, 2016)
- “The Intersection of Family Law and Estate Planning,” Presenter, Probate & Estate Planning Conference for Tennessee Attorneys (October 23 – 24, 2014)
- “Family Law,” Presenter, 4th Annual Family Law: Breaking Up Is Hard To Do Seminar (March 5, 2014)

Professional Activities

- Fellow and Tennessee State Chair, American College of Trust and Estate Counsel
- Fellow, Nashville Bar Foundation
- Lecturer to professional groups on trusts and estates topics
- Member, Estate Planning and Probate and Tax Law Sections, Nashville Bar Association
- Member, Estate Planning and Probate and Tax Law Sections, Tennessee Bar Association
- Member, Management Committee, Sherrard Roe Voigt & Harbison
- Member, Tennessee Probate Study Group, Tennessee Bar Association

Civic Activities

- Lecturer to civic and religious groups on estate planning and estate administration issues
- Member, Board of Directors, Planned Giving Council of Middle Tennessee (2014-2022)
- Member, Board of Directors, Vox Grata, Inc. (2018- 2021)
- Member, Board of Directors, Development Committee, YWCA Nashville & Middle Tennessee (2018 – 2024)