



## CARLA L. LOVELL

Member

[clovell@srvhlaw.com](mailto:clovell@srvhlaw.com)

p. (615) 742-4549 • f. (615) 742-4539

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 Law School. She is a Fellow of the American College of Trusts and Estate Counsel (ACTEC) and is regularly recognized by her peers for her professional endeavors. Woodward/White's Best Lawyers in America has listed Carla in the area of Trusts & Estates since 2012, while the Mid-South Super Lawyers has included her in its Estate Planning and Probate list since 2016. 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

- J.D., Vanderbilt University, 1988
- B.A. (with highest honors), University of Tennessee at Knoxville, 1985

### Bar Admissions

- Tennessee

### Practice Areas

- Taxation
- Trusts & Estates

## Honors

- Woodward/White: *The Best Lawyers In America* 2012-Present (Trusts and Estates)
- Nashville Business Journal 2020 Women of Influence (Trailblazer)
- Nashville Business Journal Best of the Bar 2020 (Tax/ERISA)
- Super Lawyers 2016-Present (Estate and Probate)
- AV Preeminent Peer Review Rated by Martindale-Hubbell

## Professional Activities

- Member of the Tennessee Probate Study Group of the Tennessee Bar Association
- Member of the Probate Court, Estate Planning and Tax committees of the Nashville Bar Association
- Fellow, The American College of Trust and Estate Counsel
- Fellow, Nashville Bar Foundation

- Lecturer to professional groups on Trusts & Estates topics

## Civic Activities

- Volunteer for Nashville Bar Association Pro Bono Program
- Member of the Board of Directors of YWCA Nashville & Middle Tennessee (Development Committee)
- Member of the Board of Directors of the Planned Giving Council of Middle Tennessee (2014-2022)
- Lecturer to civic and religious groups on estate planning and estate administration issues