

Lora G. Davis

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Lora is a founding member of Davis Stephenson, PLLC. She focuses her practice on providing extensive estate planning services for individuals and multi-generational families of substantial wealth. Ms. Davis assists in implementing strategies that will preserve, protect, and transfer assets consistent with each client's customized plan. While working with clients to create comprehensive legacy plans, her focus is not limited to the tax planning aspects. She addresses family dynamics and core values, charitable legacy planning, and the emotional aspects of estate planning. Her experience includes preparing a wide variety of estate planning documents, handling issues involving the Internal Revenue Service, and assisting clients with charitable planning, probate matters, trust modification and reformation, the creation and administration of business entities, transfer tax planning and marital property issues.

Prior to starting the firm, Ms. Davis was with a large international law firm in Dallas, Texas, and also served as clerk to the Hon. Robert C. McGuire, Chief Judge of the U.S. Bankruptcy Court, Dallas. Before entering the practice of law, Ms. Davis served as controller for a privately-held company and was a tax consultant with Ernst & Whinney in Oklahoma City.

Ms. Davis is admitted to practice in Texas, is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization, and is a licensed CPA in Oklahoma and Texas. She is a Fellow of the American College of Trust and Estate Counsel (ACTEC), serving as the Vice Chair of the Fiduciary Income Tax Committee and as a member of the Business Planning Committee. Lora is active in the State Bar of Texas Tax Section, currently serving as the Treasurer for the Tax Section and as a Council Member of the Real Estate, Probate and Trust Law Section, where she is also the Chair of the Powers of Attorney and Advance Directives Committee in charge of actively drafting legislation and advocating for changes to Texas laws affecting those legal documents. Lora is active in numerous other professional organizations and is a frequent speaker on trust, tax and estate planning topics.

She has been recognized by her peers as one of the Best Lawyers in Dallas in the area of Trusts & Estates as published by *D Magazine*, by Thomson Reuters' *Super Lawyers Magazine* as a Texas Super Lawyer, by *Texas Monthly* as a Five Star Professional Estate Planning Attorney in Dallas, and in Best Lawyers in America, Trusts and Estates. Since 2016, Lora has been selected by her peers to the Top 50 Women Lawyers in Texas and to the Top 100 Lawyers in Dallas/Ft. Worth lists and has been recognized since 2017 as one of the Top 100 Lawyers in Texas (as compiled by Thompson Reuters, Inc. and published in *Texas Monthly Magazine*).