

Morgan D. Barnwell
Partner

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Education

Loyola Law School, Los Angeles, LL.M., Taxation, Highest Distinction, 2015
Loyola Law School, Los Angeles, J.D., Summa Cum Laude, 2015
University of California, Irvine, B.A., Philosophy, Cum Laude, 2011

Memberships

BAR ADMISSIONS
California

MEMBERSHIPS
State Bar of California
Santa Barbara County Bar Association
Santa Barbara Women Lawyers

Morgan D. Barnwell is a Partner and a member of the Estate Planning Group. Her practice includes estate, gift, and generation-skipping transfer tax planning for high-net-worth individuals and their families, including planning for liquidity events, wealth transfer planning, and charitable planning. She holds an advanced law degree in taxation (LL.M.) and assists clients with a range of tax issues in the context of estate planning and trust administration. Morgan also assists businesses and their owners with business succession planning matters. Morgan's commitment to the community and her approachable style make her ideally suited for clients with multi-generational estate planning and business succession goals. Outside of work, Morgan enjoys spending time with her husband and two young daughters, taking dance classes, and hiking.

Representative Experience

- Represents professional trustees in taxable estates in all aspects of post-death administration matters;
- Advises third and fourth generation business owners on succession planning matters for multi-million dollar family owned business;
- Guides non-professional trustees through fiduciary, tax, and valuation issues during post-death administration in taxable estates;
- Advised on structure of joint venture between for-profit and tax-exempt organization to minimize tax risk;
- Identified and resolved issues for proposed $150,000,000+ charitable remainder trusts;
- Advised on structure of sale of multi-million dollar professional practice.

Community Involvement

As an admirer and supporter of the arts, Morgan is a member of State Street Ballet's Social Club and has been involved with the Santa Barbara Arts Fund.

Practice Areas

- Estate Planning
- Integrated Wealth Transfer Planning
- Post Death Administration
- Succession Planning
- Trust Administration
- Tax and Business Planning