



Margot Summers Edwards

Partner

1800 Broadway, Suite 300, Boulder, CO 80302

P 303.473.2722

msedwards@hollandhart.com

Margot counsels clients on the full spectrum of tax and estate planning issues.

With a particular focus on planning for entrepreneurs and real estate assets, Margot creates favorable solutions to her clients' estate planning needs.

Margot concentrates her practice on tax and estate planning, wealth transfer planning, and charitable giving techniques. She utilizes vehicles such as trusts, limited liability companies, and marital agreements to achieve tax savings, as well as to meet family and personal objectives. Margot also has experience negotiating settlements to resolve estate and trust disputes, including advising clients during mediation.

In addition to a full practice, Margot currently serves as a member of Holland & Hart's Management Committee, which oversees the management and strategic direction of the entire firm.

Margot has previously taught Wills & Trusts as an Adjunct Professor at the University of Colorado School of Law. Prior to joining Holland & Hart, Margot clerked for Justice Gregory J. Hobbs Jr. of the Colorado Supreme Court.

PRACTICES

Estate Planning, Trust Administration,
and Wealth Transfer
Trust and Estate Litigation
Tax and Benefits
Private Client

EDUCATION

University of Colorado School of Law,
J.D., 2006
Order of the Coif
Associate Editor, *Journal on
Communications and High Technology
Law*

St. John Fisher College, B.S., 2001
summa cum laude

BAR ADMISSIONS

Colorado

PUBLICATIONS

"Selecting a Trust Situs: What Should a Trustee Consider?," *Colorado Lawyer*, Co-Author, October 2021

"Holland & Hart Fiduciary Law Blog," *Contributing author*,
www.fiduciarylawblog.com

"Charitable Trusts," *Colorado Bar Association, Denver, CO*, Co-author, Co-Author, 2011, Updated 2017

SPEAKING ENGAGEMENTS

"Charitable Remainder Trusts," *CBA-CLE Understanding and Using Trusts Series*, 03/25/2021

"Tax Matters Related to Settlement Agreements," *Holland & Hart Fall Symposium*, 10/29/2019

"Current Tax Considerations for Fiduciaries and their Advisors," *Holland & Hart Fiduciary Solutions Symposium*, 11/13/2017

"Planning for the Family Business," *Colorado Bar Association Estate Planning Retreat*, 06/01/2017

"Intersections Between Marital Agreements and Estate Planning," *Holland & Hart Fiduciary Solutions Symposium*, 11/2016

"Planning With Charitable Trusts," *Colorado Bar Association Estate Planning Retreat*, 06/2011

"Does Your Charitable Trust Qualify?," *Colorado Planned Giving Roundtable Technical Series*, 10/06/2010

RECOGNITION

- *Chambers High Net Worth (HNW) Guide: Private Wealth Law - Colorado*, 2020-2021
- *The Best Lawyers in America*®, Tax Law, 2017-2022; Trusts and Estates, 2018-2022
- Colorado Super Lawyers® Rising Stars, 2012
- *5280 Magazine* Top Lawyers, Estate Planning, 2021
- *The Best Lawyers in America*® Lawyer of the Year, Tax Law – Boulder, 2022

PROFESSIONAL AND CIVIC AFFILIATIONS

- Rocky Mountain Estate Planning Council, Member
- American Bar Association, Section of Taxation and Real Property, Section of Probate and Trust, Member
- Colorado Bar Association, Trusts and Estates Section, Member
- Boulder County Bar Association, Trusts and Estates Section, Member
- Colorado Women's Bar Association, Member
- University of Colorado Law School, Will & Trusts Adjunct Professor, Spring 2017
- Holland & Hart Associates Committee, Past Member