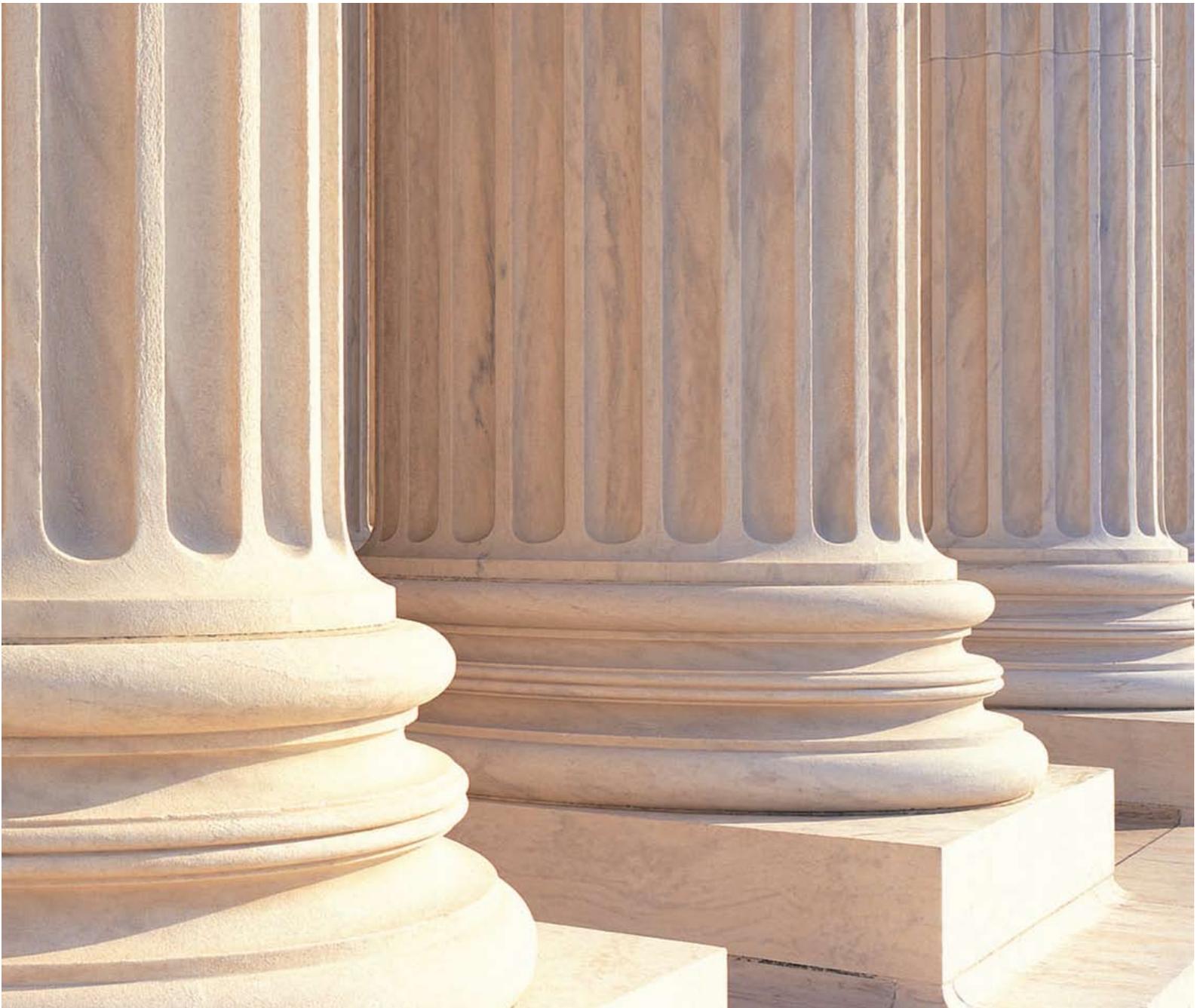


CARLSON  BURNETT

*honest approachable practical*





With collectively more than thirty years of legal experience and after working side by side for more than a decade, Darren R. Carlson and Anne K. Burnett formed what is positioned to be a premier Omaha law firm – Carlson & Burnett, LLP.

With a strong reputation as being honest and approachable lawyers who look for practical legal solutions, Carlson & Burnett, LLP continues to build upon its existing relationships with its clients. In an era when legal costs can be significant, Carlson & Burnett strives to provide superior service at competitive prices.

Our clients are regionally located throughout Iowa and Nebraska. Many of our clients in Omaha have come to know us through our active participation on civic boards and charitable foundations. The emergence of Carlson & Burnett, LLP will foster its partners' belief that participation in helping those less fortunate is not only rewarding, but a responsibility.

ESTATE PLANNING

LITIGATION & COURT MATTERS

BUSINESS & COMMERCIAL PLANNING

REAL ESTATE PLANNING

*honest approachable practical*

Rest assured that the dedication to professional service, the commitment to community service and the continued development of our relationships with our clients are all standards exemplified by Carlson & Burnett, LLP.



## Estate Planning

Our Estate Planning practice emphasizes the use of the revocable trust to eliminate probate costs while minimizing federal estate taxes. We recognize that effective estate planning must be proactive. However, good estate planning also requires the lawyers to maintain a degree of practicality to balance the tax planning complexities against the client's desire to keep the estate plan efficient and manageable. We represent a broad spectrum of clients. We represent young couples with small children and modest estates. In contrast, we also have individuals with substantial net worths. After collectively more than thirty years of practice, the true measure of our success is the consistency with which our clients refer their family and friends to us to have their estate plans prepared.

## Litigation & Court Matters

Our experience in Litigation and Court Matters is diverse. With our firm's emphasis on Estate, Business and Real Estate Planning, we have extensive experience in court proceedings. Every probate, inheritance tax determination, guardianship, conservatorship and Will contest requires trial and advocacy skills. We have represented our business clients' interests in state and federal courts. We have won verdicts and negotiated settlements resulting in significant recoveries for our clients in both business and personal matters. Our record of success demonstrates our court skills. Equally as important, we have the experience and integrity to assess when a case should be settled.

### The scope of our estate planning services that we provide our clients include:

- Preparation of Revocable Trusts and Wills for the transfer of assets on death
- Irrevocable Trusts to hold life insurance policies to avoid estate taxes
- Preparation of Durable Powers of Attorney, Medical Powers and Living Wills
- Administration of Estates and Trusts
- Representation of Trustees, Executors, Guardians and Conservators
- Handling the Estate Tax and Inheritance Tax Returns
- Creation and administration of Charitable Remainder Trusts, Charitable Lead Trusts, Public Foundations and Private Foundations
- Creation of Special Needs Trusts
- Premarital agreements and arrangements to assist with asset protection
- Medicaid Planning to reduce the risk of asset depletion
- All facets of estate Litigation

### The type of cases within the scope of our litigation and trial practice include:

- Breach of contract cases
- Will and estate contests, including guardianship/conservatorship contests
- Construction litigation regarding AIA contracts
- Owner, contractor and architect disputes
- Personal injury recoveries for families and estate



## Business & Commercial Planning

In our Business and Commercial Planning practice we assist our clients with the day-to-day legal matters that are common place in a business environment. We routinely are involved with the ownership transition by implementing buy-sell agreements which are vital to a smooth transition of ownership in family owned businesses. We work as a member of a team with our clients' accountants to identify and establish the best form of business entity—whether that may encompass a Corporation, Sub Chapter S Corporation, Limited Liability Company, Limited Partnership or Limited Liability Partnership.

### The scope of our business and commercial planning practice includes:

- Formation of Corporations, Limited Liability Companies, Limited Liability Partnerships and Limited Partnerships
- Negotiating and drafting Buy-Sell Agreements to provide for an efficient transfer of ownership
- Assisting in locating and negotiating loans from traditional and non-traditional sources
- Structuring transactions in order to minimize income and transfer taxes
- Drafting employment agreements

## Real Estate Planning

In our Real Estate Planning practice we have negotiated and drafted real estate transactional documents for buyers and sellers, for lenders and borrowers, and for landlords and tenants. From the initial stages of financing through the construction process, we have a track record of being practical, yet successful in negotiating and representing our clients in all phases of the real estate transaction. We also represent Sanitary and Improvement Districts. From the small residential transaction to foundations building large commercial and residential facilities, we have earned a reputation for paying attention to the details.

### The scope of our real estate planning practice includes:

- Handling contractual matters surrounding acquisitions, lease and sale of real estate
- Real estate financing from standard bank loans to non-conventional sources
- Agricultural real estate leases and transactions
- Commercial leasing
- Real estate development, zoning and land use
- Construction contract matters including the preparation of AIA contracts
- Extensive "Like-Kind Exchange" transactions
- Litigating disputes between contractors, owners, architects and engineers

**Carlson & Burnett, LLP**  
14710 West Dodge Rd., Ste. 203,  
Omaha, NE 68154

402.934.5500  
[www.carlsonburnett.com](http://www.carlsonburnett.com)