Gregory W. Sampson
Senior Counsel

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Practices
Trusts & Estates

Education
J.D., Southern Methodist University Dedman School of Law (1985)
B.A., Southern Methodist University (1981)

Bar Admissions
Texas

Greg Sampson focuses his practice on estate planning, asset protection planning, business succession planning, trusts, probate, guardianship and non-profit entities. He brings more than 30 years of experience to counseling clients on all aspects of wealth preservation and transfer, including estate and gift tax planning, charitable planning, retirement planning, estate and trust management, trust and estate controversy, trust modification and termination, family asset management and business succession planning. Greg is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization.

Greg has substantial experience concerning the operation, management and taxation of tax-exempt organizations. He advises public charities, private foundations and supporting organizations on a variety of issues, ranging from entity structuring, strategic planning and documenting meetings to reviewing tax returns, working with financial advisors and facilitating charitable distributions.

Clients rely on Greg to guide them through every phase of uncontested will probates, administration of the estate and all types of related controversies. He also helps clients establish guardianships for incapacitated family members and develops creative self-help solutions for clients facing unique incapacitation issues that can't be resolved with traditional legal remedies.

Greg is a regular presenter and author on various estate-related topics, including the impact of recent tax reform on estate planning and charitable giving, business succession planning for family businesses and for lawyers, asset protection planning, fiduciary duties, Texas' Prudent Investor Act and Principal and Income Act, probate and guardianship administration and procedures, alternatives to guardianships and probate, advanced directives and end-of-life decision-making, and the formation and operation of tax-exempt organizations.

Greg is currently serving a three-year term as a district director for the

State Bar of Texas, which involves working with fellow directors and officers to execute the strategic plan of the State Bar and making recommendations to the Texas Supreme Court concerning rule changes. He is also a member of the Advisory Board to the Dallas Bar Association.

Experience

- Counseling clients on all phases of estate planning and the preparation of wills and various forms of trusts to effect property transfer goals and minimize estate and gift taxes.
- Analyzing and advising clients recently relocated to Texas on revising or updating wills and trusts from other states.
- Representing clients in numerous uncontested Will probates and in administration of the estate.
- Representing executors, trustees, and beneficiaries in various estate and trust controversies.
- Representing trustees or beneficiaries in trust modification and/or termination proceedings.
- Representing beneficiaries and executors in family settlement agreements in lieu of will probate proceedings or to settle contests.
- Designing and implementing multiple family limited partnerships and other entities for family owned assets.
- Representing business owners in negotiating and drafting buy-sell agreements.
- Advising attorneys on business succession for, and purchase or sale of, a law practice.
- Analyzing client at-risk assets and designing and implementing asset protection arrangements prior to liability claims.
- Counseling clients on and preparing premarital agreements and

separate property and community property agreements and on maintenance of separate property interests.

- Counseling clients in organizing and in managing tax exempt charities.
- Preparing estate tax and gift tax returns.
- Representing taxpayers in gift, estate and income tax audits and appeals.

Press Releases

- "Gray Reed & McGraw's Greg Sampson Elected as State Bar of Texas District Director" (May 6, 2016)
- "Gray Reed's Greg Sampson Appears on Plugged In To DFW" (March 29, 2016)
- "Gray Reed Attorney Greg Sampson Chairs Dallas Father of the Year Luncheon" (September 30, 2013)
- "Greg Sampson Honored by Dallas Bar for Pro Bono Efforts" (May 15, 2013)
- "Gray Reed Attorneys Recognized by State Bar of Texas" (July 11, 2011)
- "LRM Welcomes New Hires" (August 25, 2010)

Thought Leadership

- "Open Enrollment: An Update on what the Texas Bar Private Insurance Exchange Offers Members", *Texas Bar Journal* (December 2018)

Speeches and Presentations

- "Aging with Peace of Mind: Planning Tools for Well-Being and Security", HarborChase of the Park Cities Speaker Series (July 25, 2019)

- “Business Succession Planning Made Easy”, State Bar of Texas Annual Meeting, Law Practice Management Session (June 14, 2019)
- “Ethically Closing or Selling a Law Practice”, Dallas Bar Association (September 17, 2018)
- “Ethical Issues When Transitioning from or Selling a Practice and Disposing of Client Files ”, State Bar of Texas Law Practice Management Program (June 27, 2018)
- “Communicating With Your Clients: End of Life Directives and Other Disability Planning Documents”, Advanced Elder Law Course, Texas Bar CLE (April 13, 2018)
- “Probate and Guardianship Administration - How to Avoid Common Pitfalls”, Dallas Bar Association (March 5, 2018)
- “Online Presence: Tips and Policies for Social Media – Legal Issues”, Governance of Nonprofit Organizations Course, Texas Bar CLE (August 25, 2017)
- “4th Hour Ad Litem Certification: Guardianship Alternatives and Supports and Services for Wards”, Advanced Guardianship Law Course, Texas Bar CLE (April 14, 2016)
- “Guardianship Ad Litem Certification Program for Guardianship Cases”, DBA Probate Section & DVAP (September 28, 2015)
- “Representing Clients Who May Be Incapacitated: The Lawyers Role and Ethical Duties”, Dallas Bar Association - Probate, Trusts & Estates Section Program (October 28, 2014)
- “Nonprofit Compensation: Risks, Rules and Best Practices”, Nonprofit Law Study Group - Dallas Bar Association (April 16, 2014)
- “Impact of TRA 2010 on Estate Planning and Charitable Giving”,

Texarkana CPA Society (June 28, 2011)

- "Impact of Tax Reform Act 2010 on Estate Planning and Charitable Giving ", Brown Bag Webinar Series (March 21, 2011)
- "The Impact of TRA 2010 on Estate Planning and Charitable Giving", Dallas CPA Society Member Appreciation Series (February 28, 2011)
- "Duties of Ad Litem Attorneys in Guardianship and Heirship Determinations", DVAP Ad Litem Certification Course (May 2010)
- "Restructuring Financially Distressed Nonprofits; Tax and Legal Considerations", Dallas CPA Society CPE Day (May 2009)
- "Serving as a Trustee Under the New Trust law and Attorney Fiduciary Duties in Texas" (2005)
- "Fiduciary Duties in Texas" (2004)
- "Asset Protection Planning in Texas" (2004)

Honors

- Named a "Super Lawyer" by Texas Super Lawyers (a Thomson Reuters company) as published in *Texas Monthly* (2012 - 2019)
- Named a Best Lawyer in Dallas by *D Magazine* (2011 - 2012, 2019 - 2020)
- AV Preeminent® rated (the highest possible Martindale-Hubbell Peer Review Rating designation)
- Awarded the Hon. Nikki DeShazo Pro Bono Award by the Dallas Bar Association Probate, Trusts and Estates Section (2013)
- Awarded the Sylvan Landau Founders Award for Leadership in Philanthropy by the Father of the Year Award Committee
- DBA Presidential Citation for extraordinary services as a committee

and section leader (2008)

- Named one of DVAPs Finest by Legal Services of Northwest Texas (2009)

Organizational Involvement

Professional Activities, Memberships & Affiliations

- Dallas Bar Association
  - Probate, Trusts and Estates Section
    - Chair (2008 - 2009)
    - Chair-Elect (2007 - 2008)
    - Secretary/Treasurer (2006 - 2007)
    - Program Chair (2005 - 2006)
    - Probate Council (2004 - 2005)
    - Dallas County Probate Practice Manual Revision Local Rules Committee Chair (2011 - 2013)
    - Sub-Committee Chair (2007)
  - Legal Ethics Committee
    - Co-Chair (2010)
  - Senior Lawyers Committee
    - Chair (2013)
    - Vice Chair (2011)
  - Publications Committee

- Co-Chair (2007 - 2008)
- Co-Vice Chair (2006)
- CLE Committee
  - Chair (2008)
  - Vice-Chair (2007)
- Speakers Committee
  - Chair (2005)

- State Bar of Texas
  - Dallas District Director (2016 - 2019)
  - Executive Committee Member (2017 - 2019)
  - Chair of Insurance and Member Benefits Subcommittee (2018 - 2019)
  - Chair of DCAAP (2017 - 2018)
  - Advisory Board Member to several Sections and Committees, including:
    - Real Estate Probate and Trust Law Section
    - Real Estate, Probate and Trust Law Section
    - Tax Law Section
    - Texas Disciplinary Rules of Professional Conduct Committee
- American Bar Association
  - Tax Law Section

  - Real Estate, Probate and Trust Law Section
- Co-founder and leader of Dallas Non-Profit Law Study Group (2009 - 2019)
- Estate Planning Council of North Texas
  - Board of Governors (2007 - 2009)
- Dallas Estate Planning Council

Community Involvement, Memberships & Affiliations

- Alzheimer's Association, Greater Dallas Chapter
  - Chairman of the Advisory Board (2019)
  - Advisory Board Member (2015 - 2018)
- Father of the Year Awards charity luncheon
  - Chairman (2005 - 2018)
- Southwestern Medical Foundation/UT Southwestern
  - Estate Planning Council Member
- Community Services Fund of the DBA (2010 - 2012)
  - Advisory Board Member
- Texas Bar Foundation
  - Sustaining Life Fellow
- American Bar Association
  - Fellow