

Bradley L. Jacobs



AREAS OF PRACTICE

Wealth Management

- ▶ Estate Administration
- ▶ Wealth Planning

EDUCATION

J.D., University of Kentucky,
with distinction

B.S., Indiana State University,
magna cum laude

BAR ADMISSIONS

North Carolina

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Brad Jacobs, a Director of the Firm, is a member of the Wealth Management group. Brad has experience advising families and individuals on a wide range of estate planning, tax, and business issues. His practice focuses on an array of estate planning matters, including estate tax, generational wealth transfer, life insurance, charitable donation, and business succession planning. Brad also drafts wills and trusts and counsels clients on estate administration and elder law matters. He is a certified public accountant licensed in North Carolina and is certified by the North Carolina Bar as a specialist in estate planning and probate law.

In addition to advising his clients on wealth management issues, Brad has authored numerous manuscripts and spoken at seminars presented by the North Carolina Bar Foundation, Wake Forest University School of Law, the North Carolina Association of Certified Public Accountants, the Society of Financial Service Professionals, and local and national continuing education organizations, including the National Business Institute, Lorman Educational Services, and the Rendleman Company.

Brad is active in the community and is involved in various business and community organizations. He has served as a Board member of Goodwill Industries and the Society of Financial Service Professionals and has participated as a member of the Greensboro Bar Association, the North Carolina Association of Certified Public Accountants, and the Greensboro Estate Planning Counsel.

Brad received his law degree, with distinction, from the University of Kentucky in 1986. He received his undergraduate degree, *magna cum laude*, from Indiana State University.