



# GEORGE S. HOLZAPFEL

## PRINCIPAL

## PRACTICE EMPHASIS

George serves as general legal counsel to hundreds of private and family companies and also serves as estate planning counsel to the owners of virtually all of these businesses. In addition, George acts as estate planning counsel to senior and other executives of publicly held corporations and their families. Finally, George handles the estate administration for many clients, including assuring that advanced estate plans and trusts are properly implemented.

## EDUCATION

### University of Washington School of Law

- Juris Doctor (focus on business and tax law)

### University of Washington

- Master of Business Administration (Finance/Accounting/Tax)

### University of Washington

- Bachelor of Arts, (Economics), Honors include cum laude and Phi Beta Kappa awards

## PRACTICE AREAS

- Estate Planning, Trusts & Probate
- Corporate & Business Law
- Tax Law

## REPRESENTATIVE CASES

- Estate Planning and Probate – George's experience includes advanced estate planning involving preparation of wills and trusts, charitable and family gifts, private foundations, family limited liability companies, as well as revocable living trusts and guardianships. He has also structured and implemented Qualified Personal Residence Trusts, Generation Skipping Trusts, Grantor Retained Annuity Trusts, Irrevocable Life Insurance Trusts, and other sophisticated trusts involving many millions of dollars of gifts. In addition, George has also handled the legal administration of many large and small estates, giving special consideration to post-mortem planning, tax return preparation and filing.
- Succession Planning for Businesses – As an attorney for many private businesses, George has developed and implemented many succession plans and other plans of reorganization to facilitate the transfer of ownership and control from one generation to the next. These transactions require careful attention to corporate, estate planning, tax and other areas of law. George strives to structure these transactions to achieve the goals of the parties while at the same time laying the legal foundation for the successful continuation of the business itself.



holzapfel@lasher.com



(206) 654-2433



LASHER  
HOLZAPFEL  
SPERRY &  
EBBERSON

601 Union St., Suite 2600, Seattle, WA 98101-4000

Phone: (206) 624-1230 Fax: (206) 340-2563 [lasher.com](http://lasher.com)

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### REPRESENTATIVE CASES (CONTINUED)

- Formation, Operation and Liquidation of Businesses – George has assisted in the formation and reorganization of hundreds of businesses. He puts significant focus on well-drafted buy/sell provisions in shareholders agreements, partnership agreements and similar documents in an effort to minimize time consuming and expensive disputes among co-owners of businesses. George also has experience in the negotiation and structuring of limited liability companies, joint ventures and other agreements.
- Purchases and Sales of Businesses – George has participated in several hundred purchases and sales of businesses, representing purchasers as well as sellers. These have taken a wide variety of forms, including sales of assets, sales of stock, “boot strap” redemptions, leveraged buy-outs, mergers and other reorganizations. Besides the actual legal documents, George emphasizes strategy and negotiation to arrive at the best possible result for his clients. Significant tax planning is a critical part of these transactions, and George’s goal is to save more in taxes for his clients than the cost of legal fees for the transaction.
- Executive Compensation – George’s experience in this area includes drafting detailed employment agreements for executives and other employees, sometimes with covenants not to compete, trade secret provisions and “no employee hire” clauses.
- Representation of Minority Shareholders/Partners – Using a specialized list of techniques developed from experience combined with academic teaching, George regularly represents minority partners in partnerships and limited liability companies, and minority shareholders in corporations, in an effort to provide the legal framework to give them adequate ownership, voting and compensation protections.

### PROFESSIONAL & CIVIC

- Named to Top 10 Influential Private Wealth Law Lawyers in Washington for 2023 by Business Today (July 31, 2023)
- Recognized in Chambers High Net Worth, Private Wealth Law in Washington State, 2022, 2023
- Recognized as “Super Lawyer” in Washington Law & Politics and Washington Super Lawyer magazines every year since inception in 1997
- Named “Lawyer of the Year” by The Best Lawyers in America in the practice area of ‘Closely Held Companies and Family Businesses Law;’ 2019
- Named to “Best Lawyers” by Best Lawyers in America® in the practice areas of ‘Closely Held Companies and Family Businesses Law’ and ‘Trusts and Estates;’ 2014 - 2024 ed.
- Named AV (highest) rated lawyer by Martindale-Hubbell Legal Directory for decades
- Selected as a “Five Star Professional in Estate Planning,” Seattle Magazine; 2014, 2015, 2016, 2017
- Selected as a “Five Star Investment Professional,” Seattle Magazine; 2017
- Washington State Bar Association (Probate and Trust Committee Section; Taxation Section)



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### PROFESSIONAL & CIVIC, CONT'D.

- Occasional lecturer for continuing legal education seminars for the Washington State Bar Association, the Washington CPA Society, the Attorney-CPA Tax Clinic, the University of Washington School of Law, and other organizations
- Faculty member for the University of Washington (Paralegal Extension Program) from 1985 to 1990
- Faculty member for the Golden Gate University Graduate School of Tax (Seattle Branch) from 1982 to 1992
- Awarded the Distinguished Teaching Award, 1982, Golden Gate University Graduate School of Tax
- President of Hawthorne Hills Community Council (1987-1988) and as trustee (1983 to 2013)

### PUBLICATIONS

- Right-to-Die Options Allowed Under State Law, Seattle Daily Journal of Commerce
- Personal Liability of Corporate Officers and Directors: A Short Compilation, Business Law Newsletter of Washington State Bar Association, Vol. 14, No. 2
- Successor Products Liability in Sale of Asset Transactions, Business Law Newsletter Corporate Law Section of Washington State Bar Association
- Durable Power of Attorney is a Guardianship Alternative, Seattle Daily Journal of Commerce
- Estate Planning: Avoiding Probate—Fact and Fantasy, Seattle Daily Journal of Commerce

### FEATURED IN

- In Some Trusts, the Heirs Must Work for the Money, The New York Times, Sunday, January 29, 2006
- Before Your Parents Say 'I Do' Again, Wall Street Journal's SmartMoney Magazine: April 2009
- Patience of Wealthy Taxed by Changing Rules on Estates, Puget Sound Business Journal: October 2, 2009
- Using an Incentive Trust Constructively, State Street Global Advisors Newsletter, 2012



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