



MELINDA MERK

Principal
(703) 934-1126



Bio

Melinda focuses on providing holistic multi-generational income and wealth transfer tax planning advice and estate and trust services to high net worth individuals, families, and business owners. She brings a unique and diverse perspective from her work in private law practice, Big Four accounting firms, and private banking/trust services.

Melinda has over two decades of experience advising clients with regard to domestic and foreign trusts, family limited partnerships and LLCs, grantor retained annuity trusts, dynasty trusts and other wealth transfer strategies, charitable trusts, asset protection planning, business formation, succession and pre-sale planning, estate and trust administration, and tax controversy matters.

As a seasoned tax and estates and trusts attorney, Melinda enjoys working with a wide range of clients to successfully protect and preserve their wealth. She has represented business owners, real estate developers, private equity

partners, physicians, executives, young couples, retirees, international/expat clients and their families.

Melinda started her career at a boutique trusts and estates firm in Montgomery County, Maryland, where she developed a strong foundation in estate planning and estate and trust administration.

After completing her LL.M. in Taxation at the Georgetown University Law Center, Melinda joined the National Tax Department (Personal Financial Services group) for a Big Four accounting firm in Washington, DC, where she consulted with clients on a nationwide and global basis as a Subject Matter Specialist in the areas of income and wealth transfer tax planning.

Melinda then returned to the practice of law as a Senior Counsel in the Private Wealth Services group at a national law firm in its Northern Virginia office, with a primary focus on pre-sale planning for business owners, income and estate tax planning for international clients, and asset protection planning.

She later joined another Big Four accounting firm as a Tax Director in the Personal Financial Services group, working closely with business owners and private equity firm partners on their individual income tax and estate planning.

Prior to returning to private practice, Melinda was a Senior Vice President and Regional Trust Advisor at a large bank's Private Wealth Management group for the Greater Washington Region, where she served as a resource to clients on trust and estate planning, and handled the administration and risk management of trust accounts over \$5 million.

Given her diverse background, Melinda is distinctively collaborative when working with her clients and their other advisors, and highly respected among her peers through her involvement in various professional and community organizations. She was recently awarded the Accredited Estate Planner® (AEP®) designation by the National Association of Estate Planners & Councils, which distinguishes designees for their dedication to being a collaborative advisor, and is awarded only to estate planning professionals who meet special requirements of education, experience, knowledge, professional reputation, and character.

Melinda often views her role as a “translator” by carefully listening to her clients, analyzing their situation and helping them to understand their planning options and solutions in “plain English” big picture terms. Melinda notes, “I enjoy helping clients to navigate the process and design a customized solution that is flexible, practical and understandable.”

Melinda is listed among the Washingtonian’s Top Trusts and Estates Lawyers, and is a frequent speaker and writer on estate and trust planning. She is active in the estate planning community on a local and national level, including being a current and former Board member of the Northern Virginia Estate Planning Council and the Washington DC Estate Planning Council, respectively. Melinda is also a member of the Wills, Trusts & Estates Legislative Committee for the Virginia Bar Association.

On a personal level, Melinda is a strong supporter of local philanthropy and the arts in Northern Virginia, and is a current Board member of the Community Foundation for Northern Virginia and a long-time supporter and serial adopter of Lab Rescue and other animal welfare organizations.

Melinda is originally from Pittsburgh, and is an avid Steelers fan. She currently resides in Reston, Virginia.

Practice Areas

- Taxation
- Wills, Trusts and Estates

Education

- B.S. (cum laude), Political Science and Business Administration, Shepherd University
- J.D., Duquesne University School of Law
- LL.M. in Taxation (with distinction), Georgetown University Law Center

Admissions

- Virginia
- Maryland

- Certified Financial Planner™

Honors

Melinda is listed among the Washingtonian's Top Trusts and Estates Lawyers, and is a frequent speaker and writer on estate and trust planning.

She has attained the Accredited Estate Planner® (AEP®) designation by the National Association of Estate Planners & Councils.

Activities

- Washington DC Estate Planning Council, Past Board Member
- Northern Virginia Estate Planning Council, Current Board Member
- Community Foundation of Northern Virginia (Board Member; Business Women's Giving Circle)
- Financial Planning Association of the National Capital Area
- American Bar Association Section of Taxation (Nolan Fellow, Estate and Gift Tax Committee, Fiduciary Income Tax Committee)
- American Bar Association Section of Real Property, Trust and Estate Law (Income and Transfer Tax Planning Group; Business Planning Group)
- Virginia Bar Association, Wills, Trusts and Estates Section (Legislative Committee)
- Maryland Bar Association, Estates and Trusts Section
- Fairfax County Bar Association, Estates and Trusts Section
- Shepherd University Foundation Board of Directors, Past Board Member

Publications

- "[Don't Forget About Digital Assets as Part of Your Estate Plan](#)" (May 2020)
- "[Estate Planning Simplified](#)," podcast (2020)
- "Estate Planning Under the New Tax Law," Northern Chapter of the Virginia Society of CPAs (2018)
- "Estate Planning Under the New Tax Law," Washington DC Estate Planning Council (2018)

- “Hidden Risks and Mistakes to Avoid in Estate and Long-Term Care Planning,” Lansdowne Woods Wellness Expo (2017)
- “Joint Revocable Trusts in Common Law Property States,” Maryland State Bar Association, Estates and Trusts Study Group (2017)
- “Top Ten Income Tax Tenets for Estate Planners,” DC Bar Taxation Section (2016)
- “Joint Trusts: Call Me Maybe?,” Virginia State Bar Trusts and Estates Section (2015)
- “You Give Trusts a Bad Name: Planning and Pitfalls with Joint Trusts,” Virginia CLE 33rd Annual Trusts and Estates Conference (2014)
- “Income and Wealth Transfer Tax Aspects of Joint Trusts in Community Property and Common Law Jurisdictions,” ABA Section of Taxation, Fiduciary Income Tax Committee (2014)
- “New Legislation Makes Trusts More Attractive in Virginia,” Washington DC Estate Planning Council (2013)
- “Turbocharging the Estate Plan,” ABA Section of Taxation, Fiduciary Income Tax Committee (2013)
- “Joint Revocable Trusts Update,” DC Bar Taxation Section (2012)
- “Options for Managing Trust Transfer Risk,” Delaware Bankers Association Delaware Trust Conference (2011)
- “Estate Tax Limbo: Three Steps To Take Now,” Forbes (2010)
- “Top Ten International Compliance Issues for US Persons with Foreign Investments,” Leimberg Estate Planning Newsletter #1432 (2009)
- “Estate Planning for the International Private Client,” Holland & Knight PWS Newsletter (2007)
- “Top Ten Planning and Investment Considerations for GRATs,” DC Bar Taxation Section (2006)
- “Post-Mortem Expenses: The Hubert Case – An Update,” ABA Tax Section (2006)
- “Supporting Organizations: Do They Have Our Support?” ABA Tax Section (2004)
- “Installment Sales To Grantor Trusts,” ABA Tax Section (2003)
- “Joint Revocable Trusts for Married Couples Domiciled in Common-Law Property States,” 32 Real Property, Probate and Trust Journal 345 (1997)