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BIOGRAPHY

Keith Peters represents clients in tax, business planning and estate planning matters. His practice is focused on general tax planning for corporations, partnerships, and individuals; structuring business transactions; estate planning; and federal and state tax disputes.

Keith advises businesses on entity selection; entity acquisitions, reorganizations and dissolutions; and asset acquisitions and divestitures. He has represented closely held corporations, limited liability companies and limited partnerships as well as public companies. Keith also advises tax-exempt organizations on formation and administration issues.

The estate planning portion of Keith's practice encompasses asset protection and wealth transfer tax planning, including techniques such as sales to intentionally defective grantor trusts and valuation discount planning with family-owned entities.

Keith has successfully represented taxpayers in appeals to the IRS, the Oklahoma Tax Commission, the U.S. Tax Court, and in other federal and state courts.

He often collaborates with clients' other advisors such as accountants, investment advisors, financial planners, insurance agents, appraisers and other attorneys to ensure that planning is successfully implemented and administered.

Keith is an author and speaker on various tax topics. He has authored articles in the *Oklahoma Bar Journal*, *CPAFocus*, and *The Daily Oklahoman*; served as a seminar presenter for the Oklahoma Bar Association; and spoken to physician groups regarding asset protection. He has also been a guest lecturer on tax aspects of charitable giving for an Oklahoma City University graduate course in legal issues faced by non-profit executives.

Keith's achievements have earned him inclusion in *Oklahoma Super Lawyers'* list of "Oklahoma Rising Stars" (tax, estate planning and probate, business/corporate), which recognizes the state's top up-and-coming attorneys. In 2010, *Oklahoma Magazine* included Keith in the publication's list of outstanding emerging professionals in the state.

Prior to entering Harvard Law School, Keith was awarded the Gold Medal by the Oklahoma Society of Certified Public Accountants for earning the highest CPA exam score in Oklahoma.

Keith currently serves on the boards of directors of the Oklahoma Zoological Society and the Redbud Classic and is an officer of the Estate Planning, Probate and Trust Section of the Oklahoma Bar Association. He also volunteers with the Oklahoma City Philharmonic and the J.C. Penney Leadership Program at the OU College of Business.

REPRESENTATIVE EXPERIENCE

- Tax and non-tax issues in stock sales and purchases, partnership sales and purchases, asset sales and purchases, and reorganizations.
- Negotiation of operating agreements, partnership agreements and shareholders agreements for various types of businesses, including professional entities such as medical, dental and legal practices.
- Counsel to start-up businesses, including tax and general business advice.
- Estate planning, including revocable trusts, wills, life insurance planning, dynasty trusts and intentionally defective grantor trusts.
- Asset protection planning.
- Business succession and tax planning with family limited partnerships and family limited liability companies.
- Non-profit organization formation and governance.
- Tax audits, appeals and litigation.
- Administrative aspects of federal tax law, including obtaining private letter rulings.
- Preparation and advice concerning estate and gift tax returns.
- Trust reformation to clarify trust language and allow greater flexibility while retaining generation skipping transfer tax exemption.
- Fiduciary representation in tax and non-tax matters.
- Marital planning, including prenuptial agreements.

ADMISSIONS

- Oklahoma, 2006
- U.S. District Court for the Western District of Oklahoma
- U.S. Tax Court of Appeals for the Tenth Circuit
- U.S. Tax Court

EDUCATION

- LL.M. (Taxation), New York University, 2007; Graduate Editor, *Tax Law Review*
- J.D., Harvard Law School, 2006; Chair, HLS TaxHelp Volunteer Income Tax Assistance Program
- B.A., University of Oklahoma, 2002 (Accounting); “Outstanding Senior,” Price College of Business

PROFESSIONAL CERTIFICATIONS

- Certified Public Accountant (Inactive)

PROFESSIONAL ORGANIZATIONS AND MEMBERSHIPS

- Oklahoma Bar Association (Taxation Law Section and Estate Planning, Probate and Trust Section)
- American Bar Association (Section of Taxation)
- Oklahoma Society of Certified Public Accountants
- Oklahoma Planned Giving Council

CIVIC INVOLVEMENT AND LEADERSHIP

- Oklahoma Zoological Society (Board of Directors)
- Redbud Classic (Board of Directors)
- Oklahoma City Philharmonic (Associate Board)
- OU College of Business J.C. Penney Leadership Program (Former member, Board of Advisors)