



## COUNSEL

# Timothy A. Nordgren

DURHAM, NORTH CAROLINA

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(919) 313-0047

## Practices

Trust & Estate Planning

## Industries

Privately Held & Small Business

Banking & Finance

## EDUCATION

University of North Carolina at  
Chapel Hill, J.D., 1994

University of Iowa, B.B.A., 1991

## ADMISSIONS

North Carolina

Tennessee

*Tim Nordgren provides comprehensive legal guidance when helping clients navigate their estates planning and estate administration needs.*

A member of the firm's Business Group, Tim joined Sands Anderson in 2016. For more than 20 years, he's helped families with their unique estate planning needs. He also assists Executors and Trustees with fulfilling their duties under the documents in which they are named as well as state and federal law. Tim is an elected Fellow of the American College of Trust and Estate Counsel (ACTEC), an association of lawyers skilled and experienced in the practice of trust and estate law. ACTEC Fellows are elected based on their outstanding reputation, exceptional skill, and substantial contributions to the field.

Tim's goal with each and every client is to listen carefully to their concerns, to provide sound counsel and creative solutions to their planning needs, and to use his technical expertise to draft the legal documents needed to implement the recommended planning techniques. He has a special interest in creating Special Needs Trusts to protect disabled loved ones. Through one-on-one consultations, Tim works to make sure his clients are informed and at ease with the process.

When representing clients facing complex businesses issues, Tim remains adaptive. His in-depth and broad knowledge has helped form and maintain business entities. Tim has also assisted numerous charitable organizations with obtaining tax-exempt status.

## PROFESSIONAL HIGHLIGHTS

- Saved millions of dollars in Federal Estate Taxes for clients through developing and implementing tax efficient planning strategies.
- Helped develop efficient and orderly plans for distributing assets to beneficiaries, in addition to creating Special Needs Trusts to protect disabled family members.

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## RECOGNITION

Fellow of the American College of Trust and Estate Counsel

AV Rated, Martindale-Hubbell

Board Certified as a Specialist in Estate Planning & Probate Law by the North Carolina State Bar

Business North Carolina magazine's "Legal Elite" in Estate Planning, 2018, 2021

Certificate of Achievement for Superior Commitment to Pro Bono Services, June 2013 by the NCBA and Legal Aid of North Carolina

## PROFESSIONAL AFFILIATIONS

North Carolina Tenth Judicial District Bar

American College of Trust and Estate Counsel

North Carolina Bar Association, Estate Planning, and Fiduciary Law Section, Section Council Member 2009 – 2015, Pro Bono Committee 2005 – 2011 (Co-Chair 2007 – 2009, Chair 2009 – 2011 )

## PROFESSIONAL HIGHLIGHTS CONTINUED

- Responsive to the legal needs of clients facing severe medical conditions.
- Found creative solutions to reduce or eliminate exposure to federal gift and estate taxes as well as federal and state income taxes.
- Handled complex estate and trust administration matters by assisting Executors and Trustees with the performance of their fiduciary duties.
- Presented and published numerous articles on estate planning matters for the North Carolina Bar Association.

## SPEAKING ENGAGEMENTS

Tim has presented several programs and courses for the North Carolina Bar Association, including:

- Representing Clients with Diminished Capacity, May 2015
- Hot Topics in Estate Planning and Probate Law, November 2011
- Alternatives to Full Estate Administration, July 2011
- Boot Camp: Starting an Estate Planning Practice, October 2010
- Beyond the Basics: Charitable Giving and Non-Profits, November 2009
- Defining the Gross Estate, Trust & Estate Survey Course, September 2001 and October 2004

## COMMUNITY SERVICE

Durham Rotary, 2009 - 2016

St. Philip's Episcopal Church, Treasurer, 2012 – 2015

NAMI NC, Board of Directors, 2009 – 2015

Frankie Lemmon Foundation, Board of Directors, 2005 – 2013

NAMI Wake County, Board of Directors, 2007 – 2010

NCBA Call 4All Program, Frequent Participant 2013 – 2017