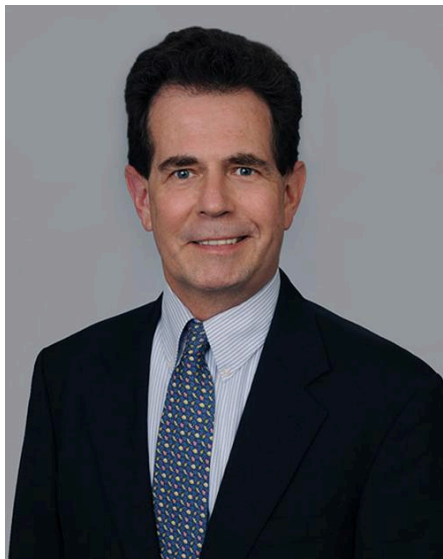




Edwin G. Fee, Jr.

PARTNER

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TOWSON

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BIOGRAPHY

Mr. Fee, a Fellow of the American College of Trust and Estate Counsel (ACTEC), focuses his practice on Trust and Estate Taxation, Trusts, Wills and Estate Planning, and Business Succession Planning. Through his more than thirty years of practice, clients include high networth individuals, business owners and fiduciaries (such as personal representatives of estates and trustees.)

RECOGNITIONS

- *Chambers and Partners High Net Worth Guide*, Private Wealth Law, Maryland (2016–2026)
- *The Best Lawyers in America*®, Trusts and Estates (2008–2027), Tax Law (2025–2027)
 - “Lawyer of the Year” Baltimore Trusts and Estates (2015, 2019, 2025)
- *Maryland Super Lawyers*®, (2007–2027); Top 100 Maryland Super Lawyers (2019; 2012–2013); Top 50 Maryland Super Lawyers (2010–2011, 2007)

PRACTICES & INDUSTRIES

[Tax](#)

[Trusts and Estates](#)

[Business Succession Planning](#)

EDUCATION

New York University School of Law, 1991, LL.M., Taxation

New York University School of Law, 1990, J.D.

Johns Hopkins University, 1987, B.A.

ADMISSIONS

Maryland

District of Columbia

New Jersey

New York

U.S. Tax Court

- Baltimore Community Foundation Professional Advisor Recognition Society (inducted 2024)
- Pro Bono Resource Center of Maryland, Pro Bono Award (2005)
- Maryland Volunteer Lawyers Service, Ten Year Volunteer Award (2005)
- Baltimore County Bar Association, Annual Pro Bono Award (2005)
- Legal Aid Bureau Equal Justice Council, Trailblazer Award (2005)
- The Arc of Baltimore, Thomas Ferciot Memorial Award (2004)
- Maryland Bar Foundation, Edward F. Shea, Jr. Professionalism Award (2001)
- Maryland State Bar Association, Presidential Best Section Award for a Project to Benefit the Public (as principal author of "Living Trusts: Get the Facts!") (2000)

MEMBERSHIPS & ACTIVITIES

Professional / Community Activities

- American College of Trust and Estate Counsel (ACTEC): Fellow (elected 2006)
- Kennedy Krieger Institute Planned Giving Advisory Council (2017-2025)
- Baltimore Symphony Orchestra Planned Giving Advisory Council (2015-present)
- The Associated Planned Giving Roundtable: Program Committee (2014-present)
- Baltimore Estate Planning Council: Board of Directors (2007-2013; 2019-2025)
- Chesapeake Planned Giving Council: Board of Directors (2012-2017)
- University of Baltimore School of Law: Adjunct Professor, Graduate Tax Program (2009)
- Whiteford, Taylor & Preston: Pro Bono Coordinator (2007-present)

Bar Association Activities

- Maryland State Bar Assoc.: Board of Governors (2011-2013; 2007-2009; 2003-2005; 1999-2001); Estate & Trust Law Section: Chair (2006-2007); Section Council (2000-2010)
- Maryland Bar Foundation: Life Fellow

TRUSTS, WILLS AND ESTATE PLANNING AND TAXATION

- Estate planning for individual with assets worth in excess of \$70 million, including several family-owned auto dealerships
- Administration of estate with assets worth in excess of \$50 million
- Administration of estate with assets worth in excess of \$30 million, including hundreds of original works of art by a major 20th century American artist, for which there was a "blockage" valuation discount
- Administration of estate with assets worth in excess of \$20 million, including water-front real estate on the Chesapeake Bay
- Administration of multi-million dollar estate with assets including an interest in a family limited partnership, for which there were valuation discounts for minority interest and lack of marketability
- Administration of multi-million dollar estate with assets including a several hundred acre parcel of developable real estate

PRO BONO

- Pro bono representation of low-income and disabled individuals through Maryland Volunteer Lawyers Service and Legal Aid Bureau

INSIGHTS

Speaker: "Where Will You Retire?," The Prosperity Consulting Group (Feb. 27, 2018)

Speaker: "Wills, Probate and Planning," Osher Life Long Learning Institute at Towson University (Feb. 19, 2018)

Speaker: "Estate Planning with Retirement Benefits," Baltimore County Bar Assoc. Estates & Trusts Comm. (Dec. 6, 2016)

Speaker: "Estate Planning and Asset Protection," Greater Baltimore Medical Center (Oct. 29, 2015)

Speaker: "Federal and Maryland Estate Tax Planning," Wells Fargo Advisors (May 19, 2015)

Speaker: "The Maryland Estate Tax Fix: Why Clients Still Need Us," Bar Assoc. of Montgomery County Estate & Trust Law Section (Mar. 9,

2015); Baltimore County Bar Assoc. Estates & Trusts Comm. (Dec. 11, 2014)

Speaker: "Practical Implications of the New Maryland Trust Act," Baltimore County Bar Assoc. Estates & Trusts Comm. (Oct. 9, 2014)

Speaker: "Estate Planning," Oppenheimer & Co. (Sept. 30, 2014; May 15, 2013)

Author: "'Permanent' Federal Estate Tax," Maryland State Bar Assoc. Bar Bulletin (Sept. 2013)

Speaker: "Key Strategies for Physicians' Asset Protection and Estate Planning," GBMC Foundation (June 26, 2013)

Speaker: "Federal Estate Tax Update," Baltimore County Bar Assoc. Estates & Trusts Comm. (April 11, 2013)

Speaker: "Revocable Living Trusts," Maryland State Bar Assoc. (Oct. 26, 2012)

Author: "The Annual Federal Estate Tax Change," Maryland State Bar Assoc. Bar Bulletin (Sept. 2012)

Speaker: "The Prudent Investor: Managing Trust Assets," Maryland State Bar Assoc. (April 10, 2012)

Author: "The Temporary Federal Estate Tax," Maryland State Bar Assoc. Bar Bulletin (Sept. 2011)

Speaker: "Modified Carryover Basis Rules for 2010," Maryland State Bar Assoc. Advanced Estate Planning Institute (May 13, 2011)

Speaker: "The 2010 Tax Act and Its Impact on Charitable Giving," Chesapeake Planned Giving Council (March 23, 2011)

Author: "Carryover Basis in 2010," Maryland State Bar Assoc. Bar Bulletin (Oct. 2010)

Speaker: "Estate Planning in Uncertain Times," Maryland State Bar Assoc. Estate & Trust Law Section Annual Meeting (June 11, 2010)

Speaker: "Future of the Federal Transfer Taxes," Maryland State Bar Assoc. Estate & Gift Tax Study Group (April 22, 2010)

Author: "Apportionment of Estate and Inheritance Taxes," Maryland State Bar Assoc. Bar Bulletin (Nov. 2009)

Author: "Portability of the Federal Estate Tax Exemption," Maryland Bar Journal (Sept./Oct. 2009)

Author: "Reducing Boomer Estate Taxes," Maryland Bar Journal (Jan./Feb. 2009)

Author: "Predicting the Future of the Federal Estate Tax," Maryland State Bar Assoc. Bar Bulletin (May 2008)

Speaker: "Using and Drafting Trusts in Estate Planning," Maryland Institute for Continuing Professional Education of Lawyers (MICPEL) (June 22, 2007; June 24, 2005; June 20, 2003; June 29, 2001)

Author: "The Ever-Changing Maryland Estate Tax," Maryland Bar Journal (Nov./Dec. 2006)

Author: "Maryland Estate Tax: Past, Present, and Future," University of Baltimore Law Forum, Vol. 36, No. 2 (Spring 2006)

Author: "Death and Taxes," Maryland State Bar Assoc. Bar Bulletin (Jan. 2006)

Author: "New Unimproved Maryland Estate Tax," Maryland Bar Journal (Mar./Apr. 2005)

Author: "Maryland Estate Tax Increases," Maryland State Bar Assoc. Bar Bulletin (Sept. 2004)

Author: "The Uncertainty of Death Taxes," Maryland State Bar Assoc. Bar Bulletin (Feb. 2003)

Author: "Is the Death of the Death Tax Greatly Exaggerated?" Maryland State Bar Assoc. Bar Bulletin (Feb. 2002)

Principal Author: "Living Trusts: Get the Facts!" Maryland State Bar Assoc. (2000)

Author: "Electing to Treat a Revocable Trust as Part of the Estate," Estate Planning (Mar./Apr. 1999)

Author: "Substituted Judgment: Estate and Medicaid Planning by Guardians," Probate & Property (Jan./Feb. 1999)

Quoted in: "Legal Loophole Leaves Upset Heir at a Loss," The Baltimore Sun (June 27, 1998)

Author: "New Disclaimer Regs. and Other Rules Affecting Jointly Owned Property," Estate Planning (March/April 1998)

Quoted in: "To Trust or Not to Trust," Wall Street Journal (Oct. 6, 1997)

Author: "Living Trusts: Debunking the Myths," Practical Lawyer (June 1997)

Author: "Shooting Down Living Trusts," American Bar Assoc. Journal (Mar. 1997)

List of other articles/speeches available upon request