

## Aimee L. Stone

### EXPERIENCE

#### **Moses, Palmer & Howell, L.L.P.**, Fort Worth, Texas

Partner, January 2017 – Present

- Practice in the areas of: estate planning; probate law; trust law; business law; and federal estate, gift, income, and partnership taxation
- Comprehensive estate planning and tax planning for a wide range of clients
- Responsible for preparation of Forms 706 and 709
- Advise clients in the formation, operation, sale, and merger of for profit and nonprofit entities

#### **Shannon, Gracey, Ratliff & Miller, L.L.P.**, Fort Worth, Texas

Partner, December 2013 – December 2016

Associate, January 2011 – November 2013

- Practice in the areas of: estate planning; probate law; trust law; business law; and federal estate, gift, income, and partnership taxation
- Comprehensive estate planning and tax planning for a wide range of clients
- Responsible for preparation of Forms 706 and 709
- Advise clients in the formation, operation, sale, and merger of for profit and nonprofit entities

#### **Bracket & Ellis, P.C.**, Fort Worth, Texas

Associate Attorney, May 2007 – January 2011

- Practice in the areas of: estate planning; probate law; trust law; real estate law; business law; and federal estate, gift, income, and partnership taxation
- Comprehensive estate planning and tax planning for a wide range of clients
- Responsible for preparation of Forms 706, 709, and 1041
- Advise clients in the formation, operation, sale, and merger of business entities

#### **Bakutis, McCully & Sawyer, P.C.**, Fort Worth, Texas

Associate Attorney, June 2004 – May 2007

- Practiced in the areas of: estate planning; probate law; trust law; business law; and federal estate, gift, income, and partnership taxation
- Comprehensive estate planning and tax planning for a wide range of clients
- Responsible for preparation of Forms 706, 709, and 1041

#### **Burdett, Morgan & Thomas, L.L.P.**, Amarillo, Texas

Associate Attorney, August 2002 – August 2003

- Utilized legal and accounting skills to manage files involving estate planning, business transactional law, and nonprofit organizations issues
- Counseled clients on various federal tax and securities issues

#### **Federal District Clerk for the Western District of Texas**, Waco, Texas

Intern, May – July 2001

## **CERTIFICATION**

Board Certified, Estate Planning and Probate Law, Texas Board of Legal Specialization, 2009 – Present

## **EDUCATION**

**Southern Methodist University Dedman School of Law**, Dallas, Texas

L.L.M. in Taxation, May 2004

Research Assistant, Professor Henry J. Lischer, Fall 2003 – Spring 2004

**Baylor University School of Law**, Waco, Texas

Juris Doctorate, May 2002

Barrister, Board of Barristers

Member, Harvey M. Richey Moot Court Society

Student Bar Association (Treasurer, 2000-2001, Class Vice President, 2000)

**Texas A&M University**, College Station, Texas

B.B.A. in Accounting, May 1999

Financed 100% through part-time jobs and academic merit scholarships

## **AWARDS**

“40 Under 40” in *Fort Worth Business Press*, May 2015

“Rising Star” in Estate Planning and Probate in *Texas Monthly*, 2010 – 2017

“Top Attorney” in Trusts, Estates and Probate in *Fort Worth, Texas Magazine*, 2007 – 2016

Martindale-Hubbell AV Preeminent Rating, 2010 – Present

Martindale-Hubbell Top Rated Lawyers in Trust & Estate Law, 2013 – Present

## **MEMBERSHIPS**

State Bar of Texas, Admitted November 2002

Tax Court, Admitted 2002

Fellow, Texas Bar Foundation, 2010 – Present

Rotary Club of Mansfield (2012 – Present; Treasurer, 2015 – 2016; Director, 2014 – Present; Youth Exchange Counselor, 2014 – 2015; International Committee, 2014 – Present; Club Service Committee, 2015 – 2015; Scholarship Committee, 2012 – Present)

Cabinet Member, Professional Advisor Outreach Cabinet, North Texas Community Foundation, 2016 – Present

Leadership Fort Worth, September 2016 – Present

Tarrant County Volunteer Attorney Services Guardianship Clinic, Mentor Attorney, 2015 – Present

State Bar of Texas Real Estate, Probate & Trust Law Section, Pro Se Forms Committee, 2013 – 2014

Probate Editor, General Practice Digest of the State Bar of Texas, 2007 – 2012

Tarrant County Probate Bar Association, 2004 – Present (Immediate Past President, 2013 – 2014; President, 2012 – 2013; President-Elect, 2011 – 2012; Treasurer, 2010 – 2011; Director, 2006 – 2014; Chair, Directory Committee, 2008 – 2010; Chair, Speaker/CLE Committee, 2008, 2009, 2012, and 2013; Co-Chair, Probate Litigation Seminar Committee, 2006; Member, Probate Litigation Seminar Committee, 2005, 2012)

Texas Young Lawyers Association, 2002 – 2012

American Bar Association Real Property Probate and Trust Section, and Business Law Section, 2002 – Present  
 Tarrant County Bar Association, Tax and Estate Planning Section, 2004 – Present (Secretary, 2006 – 2007; Treasurer, 2005 – 2006)  
 Tarrant County Bar Association Business and Estate Section, 2005 – Present  
 Tarrant County Bar Association Women’s Section, 2009 – Present  
 Tarrant County Association of Young Lawyers, 2004 – 2012  
 The College of the State Bar of Texas, 2007 – Present  
 Real Estate, Probate and Trust Law Section and Taxation Section of the State Bar of Texas, 2006 – Present  
 Texas Academy of Probate & Trust Lawyer, 2010 – Present  
 Mansfield Area Chamber of Commerce Audit Committee, 2013 – 2014  
 Leadership Mansfield, 2011 – 2012  
 Dallas Bar Association Probate, Trusts, and Estates and Tax Sections, 2003 – 2004  
 Dallas Estate Planning Council, 2003 – 2004  
 Amarillo Area Young Lawyers Association, 2002 – 2003 (Director, 2002 – 2003; Young Lawyer of the Month Award, April 2003; Committee Member, Senior Citizens Estate Planning Clinic Planning Committee, 2003; Volunteer, People’s Law School Project, 2003)  
 Amarillo Area Bar Association, 2002 – 2003 (Committee Member, Amarillo Area Spring Institute Planning Committee, 2003)  
 Amarillo Area Estate Planning Council, 2002 – 2003

## **PUBLICATIONS AND PRESENTATIONS**

- “Estate Planning 101,” The Texas A&M Foundation's 5th Annual Women, Wealth and Wisdom 2016, May 20, 2016
- “Estate Planning Overview,” Fort Worth Business Professionals Networking Group, February 4, 2015 Shannon Gracey Alert - “2015 Estate, Gift, and Generation-Skipping Transfer Tax Planning Opportunities and ABLE Accounts,” March 12, 2015
- “Estate and Incapacity Planning Overview,” Family 1st Federal Credit Union of Texas, Fort Worth, Texas, August 6, 2014
- “Creating a Positive Professional Presence,” Co-Speaker, Tarrant County Bar Association Summer Clerks Lunch and Learn on Valuable and Practical Advice from Successful Attorneys Dedicated to Mentoring a New Generation of the Bar, July 31, 2014, Fort Worth, Texas
- “Legal Tools for Management of Property and Health at End of Life,” Fort Worth Chapter Texas Society of Certified Public Accountants, Free CPE Day 2014, June 23, 2014, Fort Worth, Texas
- “2014 Estate, Gift, and Generation-Skipping Transfer Tax Planning Opportunities,” Shannon Gracey Alert, April 21, 2014
- “Legal Tools for End of Life Issues, ” Fort Worth Chapter Texas Society of Certified Public Accountants, Free CPE Day 2013, June 25, 2013, Fort Worth, Texas
- “Overview of the New Estate, Gift, and Generation-Skipping Transfer Tax Law,” January 29, 2013, Shannon Gracey Alert
- “Estate and Incapacity Planning Overview,” Cowtown Executives Association breakfast meeting, August 2, 2012, Fort Worth, Texas
- “2012 Gift Tax Planning / Opportunities and 2013 Estate, Gift, and Generation-Skipping Transfer Tax Law,” August 1, 2012, Shannon Gracey Alert
- “Important Estate and Gift Tax Changes,” January 19, 2011, Shannon Gracey Alert
- “Title Issues in Guardianships and Estates,” co-authored with Lisa Jamieson, Oil & Gas Rights and Other Issues Seminar, July 21, 2011, Arlington, Texas

- “General Estate and Incapacity Planning: How An Estate Plan Puts You In Control,” Lockheed Martin LMents Lunch & Learn, June 2, 2011, Fort Worth, Texas
- Probate Law Digest, General Practice Digest of the State Bar of Texas, Winter 2012, Spring 2012, Summer 2012, Fall 2012
- Probate Law Digest, General Practice Digest of the State Bar of Texas, Winter 2011, Spring 2011, Summer 2011, Fall 2011
- Probate Law Digest, General Practice Digest of the State Bar of Texas, Winter 2010, Spring 2010, Summer 2010, Fall 2010
- Probate Law Digest, General Practice Digest of the State Bar of Texas, Winter 2009, Spring 2009, Summer 2009, Fall 2009
- Probate Law Digest, General Practice Digest of the State Bar of Texas, Winter 2008, Spring 2008, Summer 2008, Fall 2008
- Probate Law Digest, General Practice Digest of the State Bar of Texas, Winter 2007, Spring 2007, Summer 2007, Fall 2007

### **PERSONAL**

Married to Chris Stone since May 2004, one son (Brennan)

Member, Church on Rush Creek

Volunteer, Pantego Christian Academy

Volunteer, Arlington Southwest Little League

Member, Fort Worth/Tarrant County A&M Club