



**Morgan Davis Barnwell**  
Partner

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## Education

Loyola Law School, Los Angeles, LL.M., Taxation, Highest Distinction, 2015  
Loyola Law School, Los Angeles, J.D., Summa Cum Laude, 2015  
University of California, Irvine, B.A., Philosophy, Cum Laude, 2011

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## Memberships

**BAR ADMISSIONS**  
California

**MEMBERSHIPS**  
State Bar of California  
Santa Barbara County Bar Association  
Santa Barbara Women Lawyers

Morgan Davis Barnwell is a Partner and a member of the Estate Planning Group. Her practice includes estate and income tax planning for high-net-worth individuals and their families, including planning for liquidity events, wealth transfer planning, and charitable planning. She holds an advanced law degree in taxation (LL.M.) and assists clients with a range of tax issues in the context of estate planning and trust administration. Morgan also assists businesses and their owners with business succession planning matters, and advises business owners on the tax aspects of partnership and corporate transactions. Morgan's commitment to the community and her approachable style make her ideally suited for clients with multi-generational estate planning and business succession goals. Morgan is a lover of dance and music. She takes ballet and hip-hop dance classes in Santa Barbara, and enjoys attending dance performances. She is an enthusiastic L.A. Dodgers and Lakers fan.

## Representative Experience

- Advised third and fourth generation business owners on succession planning matters for multi-million dollar family owned business;
- Guided non-professional trustee of multi-million dollar trust through fiduciary, tax, and valuation issues during post-death administration;
- Advised on structure of joint venture between for-profit and tax-exempt organization to minimize tax risk;
- Identified and resolved issues for proposed \$150,000,000+ charitable remainder trusts;
- Advised on structure of sale of multi-million dollar professional practice

## Community Involvement

As an admirer and supporter of the arts, Morgan is a member of State Street Ballet's Social Club and has been involved with the Santa Barbara Arts Fund.

## Practice Areas

- Estate Planning
- Tax and Business Planning
- Succession Planning
- Post Death Administration