Jim is a Partner with Burr & Forman in the Tax, Trusts and Estates and Corporate practice groups, where his practice is best described as a general tax practice. Jim works with a broad spectrum of clients, including start-up businesses, mid-market family businesses, publicly traded entities, and retired corporate executives and business owners.

His practice encompasses the entire range of tax planning, including, mergers and acquisitions, structuring and forming start-up businesses, asset protection, family business planning and estates, trusts and wealth preservation. In addition to his transactional planning practice, Jim is active in representing clients during audits by the IRS and/or states Department of Revenue. Finally, as the parent of a young adult on the autism spectrum, Jim is very involved in special needs planning for clients who have family members with a disability.

Jim is a Fellow in the American College of Trust and Estate Counsel and has a broad range of tax experience including: representing clients during audits by the IRS and/or Tennessee Department of Revenue, crafting tax structures for new businesses, counseling clients on the tax aspects of business exit strategies and business succession issues, designing tax-effective executive compensation packages, creating appropriate estate plans, and counseling families on special needs planning.

Jim began his professional tax career with the “Big 8” public accounting firm of Coopers & Lybrand. Following law school, he litigated tax cases for the federal government as a member of the U.S. Department of Justice. In 1994, Jim was a founding member of one of East Tennessee’s largest and most respected law firms.

Jim is the author of a professional treatise and numerous tax-related articles as well as a frequent speaker at tax programs for CPAs and attorneys throughout the Southeast. He is also a contributing author to Burr’s “Succeeding in Succession” blog.

Jim was honored for his work in special needs planning when inducted into the Special Needs Alliance. He and his wife, Diane, are both active with ASMT (Middle Tennessee’s autism support organization), the ARC of Davidson County and the Treatment and Research Institute for Autism Spectrum Disorders (“TRIAD”) program, part of Vanderbilt’s Kennedy Center.