

# LUKINOVICH

A PROFESSIONAL LAW CORPORATION

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## Daniel H. Bruni

Daniel Bruni advises clients on matters related to estates, trusts, closely held businesses and the transfer of private wealth. He assists clients in creating and implementing comprehensive estate plans through a variety of established techniques tailored to clients' planning objectives. Strategies often incorporate the use of wills, trusts and family limited partnerships; high-level tax planning for income, gift, estate and generation-skipping transfer taxes; life insurance; asset protection; business succession planning; international and cross-border planning; and this extends to the administration of clients' estates upon death.

Daniel also frequently represents business owners in the sale of their businesses and advises on matters involving reorganizations, mergers and acquisitions, transitions among generations or key employees and employment agreements.

Daniel is a board-certified tax law specialist\* and has over 14 years of tax and legal experience, having previously practiced law in Montana prior to joining the firm and worked at a big-four accounting firm in Switzerland.

Daniel received a B.A. in English from Louisiana State University (2002), a J.D. from Loyola University, New Orleans (2008) and an LL.M. in Tax from the University of Florida (2013).

Daniel is admitted to the practice of law in Louisiana and Montana and is active in the following organizations:

- *Member of Society of Trust and Estate Practitioners (STEP)*
- *Member of the New Orleans Estate Planning Council (NOEPC)*
- *Member of the Montana State Bar Association's Business, Estates, Trusts, Tax and Real Property (BETTR) Section*
- *Board Member of the Salvation Army of Greater New Orleans*
- *President of Global Maritime Ministries*

\*as certified by the Louisiana Board of Legal Specialization



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