Keith V. Novick

Partner

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Estate planning attorney Keith Novick concentrates his practice on trusts and estates and sophisticated private wealth matters, often for Dallas-area entrepreneurs, professionals and executives in oil and gas, real estate and other sectors. Keith's institutional and business clients – from middle-market to Fortune 500 companies – rely on him for a wide variety of transactional services and issues, including:

- Business succession and disposition
- Trust administration services
- Marital property planning, including the preparation of pre-nuptial agreements and post-nuptial agreements
- Multigenerational, family-owned businesses
- Estate planning, including the preparation of sophisticated wills, revocable trusts, irrevocable trusts and related documents that result in the reduction of estate taxes and generation-skipping transfer taxes
- Probate
- Estate litigation
- Charitable planning, including the creation and implementation of charitable remainder trusts, charitable lead trusts and private foundations
- Asset protection planning
- Business entity formation and business succession planning

Keith represents fiduciaries and beneficiaries in estate and trust administration services, and clients in tax controversies before the Internal Revenue Service. In addition, he represents executors and administrators in the handling of estates, including will probate, preparing the federal "estate tax" return (IRS Form 706), preparing the estate inventory and/or accounting, will contests and estate tax litigation. He works with trustees on the administration of trusts and related matters, including the interpretation and construction of trust provisions, the appointment or removal of trustees, and trust accounting.

Keith also represents beneficiaries of estates and trusts, individuals and families, regarding the formation, operation and transfer of family business and property ventures, including corporations, partnerships (general and limited), limited liability companies, trusts and tax-exempt organizations.

Awards and Recognition

- Selected by his peers for inclusion in *The Best Lawyers in America*© in the field of Trusts and Estates (2003 – 2024)
- Selected for inclusion in the Texas Super Lawyers® list, a Thomson Reuters business, as published in *Texas Super Lawyers Magazine*
    - Estate Planning & Probate (2003 – 2017)
- Recognized, AV Preeminent® 5.0 out of 5 Peer Review Rated, Martindale-Hubbell® Peer Review Ratings™

Affiliations

- Member, State Bar of Texas
    - Real Estate, Probate and Trust Section
    - Tax Section
- Board Certified, Estate Planning and Probate Law, Texas Board of Legal Specialization
- Member, Dallas Bar Association
    - Probate, Trusts & Estates Section
- Member, The College of the State Bar of Texas
- Member, Dallas Estate Planning Council
- Member, American Bar Association

Community Involvement

- Member, Advisory Council, The Dallas Foundation
- Member, Advisory Council, Communities Foundation of Texas
- Member, Development Committee, Cotes du Coeur, American Heart Association
- Alumni Member, Dallas Regional Chamber
- Fundraising Chair, Gardere Gearheads, Bike MS, National MS Society
- Volunteer, Meals on Wheels
- Member, Highland Park United Methodist Church
- Graduate, Dallas Regional Chamber®, Leadership Dallas (1993)

Practice Areas

- Corporate
- Estate Planning

Education

- Texas Tech University School of Law (J.D., cum laude, 1984)

- Texas Tech University (B.B.A., 1980)

Admissions

- Texas (1984)
- Texas State Courts (1984)