

# **Daniel B. Finch**



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**Partner**

- [dfinch@envisage.law](mailto:dfinch@envisage.law)
- [\(919\) 755-1317](tel:(919)755-1317)

## **Court Admissions**

- All North Carolina State Courts (2001)
- United States Tax Court (2010)

## **Education**

- Campbell University School of Law, Juris Doctor (J.D.) 2001
- Campbell University School of Law, Master of Business Administration (MBA) 2001
- North Carolina State University, Bachelor of Arts (B.A.) 1997

## **Bar Activities**

- North Carolina Bar Association
  - Estate Planning Section
  - Tax Section
- Wake County Bar Association

## **Honors & Recognition**

- *Super Lawyers*, Rising Star 2012
- *Business North Carolina Magazine*, Business North Carolina's Legal Elite 2021 and 2022

## **Prior Employment**

Pinna, Johnston & Burwell, P.A. 2001-2021

## **Publications & Presentations**

- 2020 - American Bar Association Publication, Family Advocate Magazine - Client Manual - Summer 2020 Edition, "In Tomorrow We Trust" (Regarding estate planning issues specific to separation and divorce).
- 2022, 2020, 2018, 2019, 2014, 2012, 2010, 2008 - "Basics of Estate Administration"; North Carolina Bar Association, Cary, NC.
- 2019 - "Trusts & Estates", North Carolina Bar Association Annual Family Law Fall CLE, Pinehurst, NC.
- 2018 - "Till Death (or Divorce) Do Us Part - The Intersection of Estate Planning and Family Law"; North Carolina Bar Association Estate Planning and Fiduciary Law Section Annual meeting CLE at Kiawah Island, SC.

## **Practice Areas**

- **Administration of Trusts, Estates & Probate**
- **Wills, Trusts and Powers of Attorney**
- **Tax Audits, Workouts & Tax Controversy**
- **Corporate & Business Law**

Daniel is a trusted advisor to his clients, both families and corporations, guiding them through periods of crisis. Daniel often assists families immediately after the loss of a loved one, assisting with all facets of probate, estate and trust administration, and tax issues that arise in this context. Daniel also represents individuals and corporations in response to notices from the IRS and the North Carolina Department of Revenue, in connection with deficiencies, audits, and other tax controversies.

Daniel served as one of the attorney public administrators in Wake County for six years, from 2003 to 2008. During this time, he was regularly requested by the Clerk of Superior Court to serve as the Administrator of a decedent's estate or as the Guardian of the Estate for an incompetent individual. Serving in this capacity provided him with valuable experience in the many aspects of estate and

guardianship administration, as well as an appreciation for the difficult job of the Office of the Clerk of Superior Court. Daniel's years of experience in estate and trust administration also guide his philosophy in crafting estate plans, with an emphasis on the practical.

Daniel was born in Oxford, North Carolina in 1975. He graduated from North Carolina State University in 1997 with a Bachelor of Arts degree in Political Science and a minor in Business Administration. He graduated from Campbell University School of Law with a JD degree and Campbell University School of Business with an MBA, both in 2001. After graduation, he practiced with the firm Pinna, Johnston Burwell, P.A. from 2001, and as a partner from 2005, until the merger of Pinna Johnston & Burwell with Envisage Law in 2021.

Daniel was recognized by Super Lawyers in 2012 as a Rising Star and was recognized by Business North Carolina Magazine in 2021 and 2022, as one of Business North Carolina's Legal Elite, in the category of Tax and Estate Planning.

Daniel has two children and has been married to Julie since 1999.

We exist to help our clients achieve their visions for the future.

We stand shoulder to shoulder with our clients, helping them to anticipate, avoid and overcome challenges and obstacles to their successes.

**A Rich Tradition. A Bright Future.**

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