

Brad Trevino, JD, LL.M., MBA, MSF

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PROFESSIONAL EXPERIENCE:

New York Life Insurance Company, Addison, TX

Corporate Vice President & Advanced Planning Consultant, November 2016 - Present

- Consult with agents and extremely high-net-worth clientele to strategize solutions for complex estate and business planning matters using sophisticated tax advantaged solutions
- Research and develop intricate plans for tax mitigation for large estates and businesses
- Determine appropriate use of ILITs, GRATs, IDGTs, SLATs, Dynasty Trusts, Special Needs Trusts, Revocable Trusts, and other effective estate planning strategies
- Determine appropriate use of Buy-Sell Agreements, Key-Person policies, Private Split-Dollar arrangements, Non-qualified deferred compensation plans, IRAs, and other business succession planning tools for affluent business owners
- Foster relationships with attorneys, CPAs, and other professional advisors to develop and implement recommended plans
- Perform in-depth reviews of estate and business planning documents to identify risks, errors, or gaps in planning
- Develop and present educational seminars on multifaceted estate and business tax planning matters
- Team subject matter expert in federal taxation

Hunter, Hunter, & Sonnier, Lake Charles, LA

Attorney, June 2012 – November 2016

- Litigated myriad tax, trust, and estate planning cases for ultra-high-net-worth clientele with estates valued between \$40 million and over \$20 billion
- Acted as primary litigation attorney for all exclusive research and litigation matters for the firm in state, federal, and US tax court
- Worked extensively with matriarch of a \$20 billion family office advising on tax, private foundation, litigation, and estate planning matters.
- Reviewed, analyzed, and drafted complex estate planning documents
- Collaborated to develop effective strategies to mitigate tax liability for highly affluent clientele

Allen Parish District Attorney's Office, Oberlin, LA

Assistant District Attorney, August 2010 – June 2012

- Represented the state of Louisiana in investigations and prosecutions of felony cases from grand jury proceedings through appeals process
- Advised and collaborated to develop trial strategy, plea agreements, sentencings, and all other matters of litigation before the court
- Acted as lead prosecutor for all cases pertaining to crimes against children
- Served as temporary City Attorney for the Village of Reeves

United States District Court, Baton Rouge, LA

Legal Intern, August 2009 – January 2010

- Interned for the Honorable James Brady in The Middle District of Louisiana
- Researched case law; drafted opinions, motions, and orders; and assisted in a wide variety of district court matters

ADDITIONAL EXPERIENCE:

Northwestern Mutual Life Insurance Company

Agent and College Unit Director

- Number 2 first year agent in the Western Region
- Number 4 college unit in the country

Massachusetts Mutual Life Insurance Company

Field Director

EDUCATION:

University of Indiana Kelley School of Business, Bloomington, IN

- Master of Science, Finance, 2019
- Master of Business Administration, 2017

University of Alabama School of Law, Tuscaloosa, AL

- Master of Laws in Taxation, 2012

Louisiana State University Paul M. Hebert Law Center, Baton Rouge, LA

- Juris Doctor, 2010

Santa Clara University, Santa Clara, CA

- Bachelor of Science in Business, Marketing, 2001

CERTIFICATIONS:

State Bar of Texas; Bar # 24113867—Current Member in Good Standing

OTHER PROFESSIONAL ACTIVITIES & AFFILIATIONS:

- Adjunct Professor of Commercial Law, McNeese State University (2013-2016)