

## ATTORNEY BIOGRAPHY



### Allen J. Falke

Of Counsel

**Tel:** 508.929.1649 | **Fax:** 508.463.1394 | **Email:** afalke@mirickoconnell.com

**Worcester Office:** 100 Front Street | Worcester | MA | 01608-1477

#### Legal Administrative Assistant

Maureen Zucco

Tel: 508.929.1647 | Email: mzucco@mirickoconnell.com

#### Practice Groups and Specialty Areas

Business

Tax

Trusts and Estates

Estate Planning

Probate Administration

#### Education

JD, Western New England College School of Law (1996); CALI Excellence for the Future Award (Corporate Tax)

LLM in Taxation, New York University School of Law (2001)

BS, Worcester State College

#### Bar and Court Admissions

Massachusetts

Connecticut

#### Professional License

Certified Public Accountant (Massachusetts and Maryland)

#### Professional/Community Affiliations

Massachusetts Bar Association

Worcester County Bar Association

Greater Worcester Community Foundation, Corporator

Massachusetts Education and Career Opportunities, Inc., Treasurer

Worcester State Foundation, Director

Estate and Business Planning Council of Worcester, Treasurer

Allen joined Mirick O'Connell as Of Counsel in June 2014. He is a member of the Firm's Business and Trusts and Estates Groups. He focuses his practice on tax law and estate and business planning. Allen provides estate planning for high-net-worth individuals and succession planning for business clients. He advises clients on tax matters related to business acquisitions and restructuring, and business formations and combinations. He reviews and advises clients on estate, gift, individual, corporate, partnership, and fiduciary tax compliance matters. He also has extensive experience representing clients on audits with taxing authorities.

In 2021, Allen was selected by his peers for inclusion in *The Best Lawyers in America*© 2022 in the field of Tax Law.

Prior to joining the Firm, Allen practiced at Greenberg, Rosenblatt, Kull and Bitsoli, P.C.; CCR, LLP; and PricewaterhouseCoopers, LLP.

#### Publications/Presentations

- "[Considerations for Parents as Children Turn 18](#)," *On Air with Mirick O'Connell* legal podcast (September 30, 2021)
- "[Estate Planning Techniques in a Low Interest Rate Environment](#)," *On Air with Mirick O'Connell* legal podcast (August 31, 2020)
- Quoted in "How to Buy Property with a Spouse, Friend or Business Partner," *US News & World Report*, July 2016
- Quoted in "The Pros and Cons of Investing in a Vacation Home," *US News & World Report*, February 2016
- "Cutting Edge Issues in Central Massachusetts," *MCLE Regional Estate Planning Conference*, February 2016
- "Why Clients Should Think Twice Before Gifting Assets," *Financial Planning Blog and On Wall Street*, October 2015
- "Estate Planning Headaches to Avoid When Clients' Assets Span State Lines," *Financial Planning Blog*, September 2015
- "Drafting Trust Distributions," *NBI*, April 2015
- "Business Tax Considerations for 2015," *Worcester Business Journal*, February 2015
- "Cutting Edge Issues in Central Massachusetts," *MCLE Regional Estate Planning Conference* (February 2015)
- Quoted in "11 Things You Never Thought of When You Decided Not to Get Married," *Forbes*, September 26, 2014