



## DANIEL G. JOHNSON

### Background

Daniel G. Johnson is a Principal in Cummings & Lockwood's Private Clients Group and is based in the Stamford office. Dan is Principal-in-Charge of the Stamford office where he has practiced since joining the Firm in 1997.

He practices primarily in the areas of estate planning, family business succession planning, estate administration and trust administration. Dan frequently lectures on estate and tax planning topics before both lawyer and non-lawyer audiences.

### Practice Areas

- Private Clients Group
- Wills, Trusts and Estate Planning
- Probate and Estate Administration
- Fiduciary and Trustee Services
- International Estate and Tax Planning
- National Charitable Planning Group
- Business Succession Planning
- Estate Planning for Hedge Fund and Private Equity Principals
- Estate Planning for Corporate Executives
- Estate Planning for Collectors, Authors, Artists and Musicians
- Tax Controversy and Litigation

### Education

- University of Virginia School of Law (J.D., 1997)
- Georgetown University (A.B., *cum laude*, 1994)

### Bar Admissions

- Connecticut, 1997
- Massachusetts, 2003
- New York, 2007

### Professional Organizations

- Connecticut Bar Association, Probate Section



**Daniel G. Johnson**

Principal

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# CUMMINGS & LOCKWOOD LLC

- New York State Bar Association, Trusts and Estates Law Section
- Estate Planning Council of Lower Fairfield County, Inc.

## Professional Recognition

- The Best Lawyers in America, 2018 - Present
- Connecticut and New England Super Lawyers, 2012 - Present
- Fairfield County Business Journal, "40 Under 40" Award, 2010

## Civic and Philanthropic Activity

- Stamford Symphony Orchestra, Board of Directors, Member
- Pequot Library, Board Member
- Friends of Materials for the Arts, Board Member, Treasurer, 2007 - 2016
- New Paradigm Theatre, Board Member, Secretary, 2013 - 2015
- Brooklawn Country Club, Member
- Fairfield American Little League, Coach

## Articles/Publications/Presentations

- Planning for a Step-up in Basis in a High Exemption Environment
- Planning for the Transfer of a Hedge Fund or Private Equity Interest
- 10 Challenges When Planning for the Business Owner
- Connecticut Probate Deskbook; co-author, Thomson Reuters
- Settlement of Estates in Connecticut, 3d, co-author, Thomson Reuters
- "Diversifying Charitable Remainder Trust Investments," *Trusts & Estates Magazine*, October 2017, co-author with Conrad Teitell and Katherine A. McAllister
- "Legal Underpinnings for Formulating and Defending Estate Plans," *Trusts & Estates Magazine*, January 2016, co-author with Conrad Teitell and Katherine A. McAllister