# Brian R. Ott

Partner


**Office:** Reading, PA

**Email:** bott@barley.com

**Tel:** (610) 898-7158


## OVERVIEW:

Brian Ott is a partner in the firm's Trusts & Estates group. He focuses his practice on both complex and simple estate and tax planning, administration of estates and trusts, business succession planning and on the representation of private foundations and tax-exempt organizations. He regularly advises individuals and corporate fiduciaries in the interpretation of governing documents and in the administration of trusts, guardianships and estates.

Brian understands and appreciates the unique concerns and personal nature of the work he provides to his clients. Brian's estate planning practice includes the following:

- Drafting complex and simple estate plans including wills, revocable trusts, dynasty trusts, irrevocable insurance trusts, qualified personal residence trusts, grantor retained annuity trusts (GRATs), charitable remainder trusts, family limited partnerships, limited liability companies and powers of attorney.
- Assistance with retirement planning and charitable giving.
- Counseling owners of closely-held businesses on business succession planning, business formation and governance issues.
- Advising clients of the consequences of proposed transfers and transactions as they relate to estate, gift, generation-skipping and income taxes.
- Assistance with estate administration and the probate process.
- Counseling clients about long-term care planning and elder law issues, especially as related to eligibility for Medicare and Medical Assistance.

Brian is a member of the Real Property, Probate and Trust Law Section of the Pennsylvania Bar Association. He serves on the Orphans' Court Rules Committee of the Berks County Bar Association and on the boards of directors of several charitable organizations.

When he's not working for his clients, he can usually be spotted throughout the Berks County area transporting his five children to their never-ending assortment of activities.

## EDUCATION:

- Villanova University Charles Widger School of Law, LL.M. in Taxation
- Boston College Law School, J.D., cum laude
- Lehigh University, B.A., with honors

## ADMISSIONS:

- Commonwealth of Pennsylvania
- U. S. District Court for the Eastern District of Pennsylvania
- United States Tax Court

## PRACTICE AREAS:

- Trusts & Estates
- Tax

## INDUSTRY GROUPS:

- Senior Living

## COMMUNITY INVOLVEMENT:

**Friedens United Church of Christ Oley, Pennsylvania**
Elder and vice president

**Oley Valley Community Library**
Director

**Antietam Parents Aquatic Association**
Treasurer

**Dreibelbis Farm Historical Society Inc.**
Director

**Mount Penn Rotary Club**

Past president

**Phoebe Ministries**

Former board member

## MEMBERSHIPS:

- Pennsylvania Bar Association
- Berks County Estate Planning Council; past president
- Berks County Bar Association; past director

## PRESENTATIONS:

- "Why You Can't Afford to Miss out on a 1031 Exchange", Wake up with Barley: A Morning on Real Estate (September 2017)
- "Portability vs. Credit Shelter Trust", Fiduciary Education Foundation Annual Conference (May 2015)

## RELATED NEWS:

- Barley Snyder Consolidates Berks Office Locations
  October 4, 2023
- High Hotels Ltd.  Innovation Through Creativity and Collaboration
  February 27, 2023
- Barley Snyder Attorneys Brian Ott and Keith Mooney named to Lehigh Valley Business's Law Power List
  December 29, 2022
- What the Final Tax Bill Means for Estate and Gift Tax Planning
  December 22, 2017
- Thirteen Barley Snyder Attorneys Named Select Lawyers
  December 27, 2016
- Possible Changes Coming for Valuations of Family Limited Partnerships and Limited Liability Companies
  August 5, 2016