

Thomas C. Hoffman, II

Thomas C. Hoffman, II has represented thousands of businesses and high net worth individuals during his career as a lawyer and CPA. He has helped plan hundreds of business successions for a diverse group of clients, including entrepreneurs engaged in manufacturing, oil & gas, timber, publishing and other industries in more than 15 states. He began his career as a CPA with Ernst & Young in Pittsburgh in 1990.

Mr. Hoffman often uses atypical approaches seeking the best possible solution for clients' complex ambitions and circumstances. He works closely as a team with clients' accountants, bankers, insurance agents and wealth management advisors, aspiring to provide high quality, seamless client care. He also taps into his own working group of key strategic legal and tax advisors, including former IRS agents who bring an even broader base of knowledge and experience to bear on clients' more unusual matters.

Mr. Hoffman concentrates his practice on closely held business planning, business succession planning, implementation of sophisticated estate and trust planning, administration of complex estates and trusts, and the tax consequences of these matters. In business successions, he knows how to ask tough questions on whether a successor will have the right skills to replace the seller's abilities and maintain a profitable business. He also knows how to communicate difficult issues in clear language. He has represented clients before the IRS in federal income, estate and gift tax cases.

Mr. Hoffman is the originator of the Knox Law Institute®, which provides valuable, relevant and practical education on legal matters to businesses, governmental entities, nonprofit organizations, insurance companies, financial institutions, individuals and families, and professional advisors. He is a major contributor for topics including estate and business succession planning, tax law, asset protection, shale energy planning, trusts, charitable giving and more.



EDUCATION

- University of Pittsburgh School of Law, J.D.
- Pennsylvania State University, B.S., Accounting

HONORS & RATINGS

- AV Preeminent® Peer Review Rated
- Included in *The Best Lawyers in America*® (Trusts and Estates), 2019-2020

SPEAKING ENGAGEMENTS & PUBLICATIONS

- *Numerous programs through Knox Law Institute®; a selection includes:*
- Firm's Annual Professional Advisor Symposium, 2013-2018
- Penn State Smeal College of Business, Business Succession Seminar, April 2017
- Penn State Center for Private Forests/Ag Sciences Private Forest Landowner Conference, Altoona, PA, March 2015 and 2017
- Foundation for Sustainable Forests Loving the Land Conference, May 2015, 2016 & 2018
- Business Succession Seminar, Erie Regional Chamber & Growth Partnership, Dec 2015
- Financial Planning Association of Pittsburgh's Estate Planning Conference, Sept 2015
- "Landowners, Legacies and Legalities," Published in *Pennsylvania Forests* (Volume 105, Number 3; Fall 2014)
- Frequently speaks about trust planning, estate planning, and business succession issues for various organizations including various professional groups, Penn State University / Extension, PA Dept. of Conservation and Natural Resources, The Community Foundation of Western PA & Eastern OH, Fairbanks Estate Planning Council, and many other groups

COMMUNITY & PROFESSIONAL SERVICE

- Penn State University, *Gift Planning Advisory Council, Chair*
- Penn State Erie, The Behrend College, *Council of Fellows Member*
- Erie Center for Arts and Technology (ECAT), *Board Member, Treasurer*
- Catholic Foundation of Northwest Pennsylvania, *Board Member*
- The Foundation for Sustainable Forestry, *Board of Directors, Secretary*

PRACTICE CONCENTRATIONS

- Estate Planning & Administration
- Business Succession Planning
- Business & Tax

FIRM INVOLVEMENT

- Shareholder

ADMISSIONS & CERTIFICATIONS

- Pennsylvania
- New York
- Ohio
- Alaska
- U.S. District Court, Western District of Pennsylvania
- U.S. Tax Court

PROFESSIONAL AFFILIATIONS

- Erie County Bar Association
- Pennsylvania Bar Association
- American Bar Association
- Estate Planning Council of Erie, *Past President*
- Estate Planning Council of Pittsburgh
- American Institute of Certified Public Accountants
- Pennsylvania Institute of Certified Public Accountants