



# Carl W. Dufendach

Partner | [cdufendach@wnj.com](mailto:cdufendach@wnj.com)

Grand Rapids

t +1.616.752.2136

f +1.616.222.2136

+1.866.533.3018 – ext. 2136



## Biography

Carl Dufendach concentrates his practice in the areas of estate and trust planning and administration, tax and general corporate work, including working with closely held businesses. Carl has helped clients reach their objectives in everything from basic estate planning and guardianships to tax-saving trust arrangements, charitable gifts, trusts, foundations and supporting organizations, and sophisticated transfer and succession strategies.

## Practices

- Business and Corporate Services
- Closely Held Businesses
- Trusts and Estates
- Charitable Giving and Organizations
- Estate Settlement and Trust Administration
- Family Business and Succession Planning
- Family Office Representation
- Fiduciary Representation
- Fundamental Estate Planning
- Tax Planning
- Private Client and Family Office
- Tax Law

## Education

- Duke University J.D. 1979 with distinction
- Wheaton College 1975 with honors

## Representative Experience

- Works with the owners of all types of closely held businesses to provide for continuation of business into the next generation
- Assists fiduciaries of large estates in resolving complex disputes in a tax-wise manner
- Provides trust and estate administration services

## Honors and Awards

- Named a Top Lawyer in Trusts and Estates, *Grand Rapids Magazine*, 2019-20
- Private Wealth Law – Michigan, *Chambers High Net Worth Guide*, 2016-20
- Named to Michigan Super Lawyers, 2006-Present
- Named the *Best Lawyers' 2018* and 2015 Grand Rapids Trusts & Estates Lawyer of the Year
- 2020 A Lawyer Helps Pro Bono Honor Roll, State Bar of Michigan
- AV Preeminent Peer Review Rated, Martindale-Hubbell
- *Best Lawyers in America*, Trusts and Estates, 2007-Present
- Leading Lawyers Michigan, 2014-Present
- Fellow of the American College of Trust and Estate Counsel, 2003-Present
- Order of the Coif

## Publications

- Low Interest Rates Ideal for Estate Planning, 11/3/2010
- Estate Planning Focus - Fall 2010, 11/3/2010
- Contributing author of *Michigan Estate Planning Handbook*, Michigan Institute for Continuing Legal Education, 1999-Present

## Professional Affiliations

- Christian Legal Society
- Grand Rapids Area Chamber of Commerce  
Small Business Council
- West Michigan Estate Planning Council
- American College of Trust and Estate Counsel

## Community Affiliations

- Beacon Hill at Eastgate  
Chair of Board of Trustees
- Rockford Public Schools  
Board of Education, President (2000-01), Vice President (1999-00), Treasurer (1998-99), Secretary (2002-04); Trustee (1997-04)

## **Bar Associations**

- American Bar Association  
Real Property, Trust and Estate Law Section
- State Bar of Michigan

## **Teaching and Lecturing**

- Instructor, Institute of Continuing Legal Education

## **Speaking Engagements**

- "Highlights of the 2009 Heckerling Institute," Lake Michigan Estate Planning Council, Grand Haven, Michigan, February 19, 2009

## **Admitted**

- 1979, Michigan