

Matthew F. Hafen

Shareholder



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Overview

Matt Hafen assists clients throughout the western United States and internationally on a variety of business, trust, and estate matters including the development and implementation of estate plans, wealth-transfer strategies, asset protection strategies, business-succession plans, the formation, governance, and sale of business entities, and franchising matters. Matt offers practical advice to business owners and families to help each of his clients ensure that their goals are achieved.

Matt's estate planning practice includes advice regarding sophisticated tax, estate, asset protection, and business planning strategies, including the preparation of documents such as wills, living trusts, durable powers of attorney, healthcare directives, asset protection trusts, foreign trusts, irrevocable life insurance trusts, gift programs, grantor retained annuity trusts, education trusts, family limited partnerships and limited liability companies, generation-skipping transfers, charitable giving, charitable remainder trusts, private foundations, and prenuptial and postnuptial agreements.

In addition, Matt is experienced in assisting families through the legal process of probate, trust administration, guardianships, and conservatorships.

Matt also maintains an active business practice, where he counsels business owners on franchising matters and the formation and governance of business entities such as limited liability companies, S-corporations, and non-profit entities. His business practice includes experience in advising clients regarding the purchase and sale of businesses, as well as successfully resolving contract disputes and disputes between business partners.

Recognition

- Martindale-Hubbell® AV Rating
- Recognized in *Utah Business Magazine* for Utah Legal Elite for Estate Planning
- Selected in the *Utah Super Lawyers*®

Insights

- "With End-of-Year Gifts, Stay Out of the IRS' Doghouse," UtahBusiness.com, December 22, 2016

Activities and Affiliations

Presentations

- "Get It While the Getting's Good: Asset Protection Opportunities and Developments," presented to the Southern Utah Estate Planning Council, October 2019
- "Keeping Up with the Legislature – Estate Planning Implications of Recent Utah Legislation," presented to the Southern Utah Estate Planning Council, September 2018
- "Tips for Avoiding Family Estate Conflicts," presented in Sun City, Mesquite, July 2018
- "Fully Using Tax Advantages of LLCs," presented in NBI seminar, May 2018
- "Avoiding Probate with a Living Trust," presented in Sun City, Mesquite, April 2018
- "Administering the Estate: The Collision between Estate Planning and Real Property Law – A Cautionary Tale," presented at the Spring Utah State Bar Convention, March 2018
- "Planning Ahead: The Benefits and Options for Healthcare Directives and Powers of Attorney," presented in Sun River, St. George, March 2018
- "Strategies for Avoiding Family Estate Conflicts," presented at Dixie State University Retirement University, January 2018
- "Innovative Strategies for Tax Basis Maximization," presented to the Southern Utah Estate Planning Council, November 2017
- "The New Normal – Practical Thoughts on Planning After the Taxpayer Relief Act of 2012," presented at NBI estate planning seminar, June 2017
- "Pitfalls in Estate Planning and Asset Protection," radio presentation on local Fox News Radio station, January 2017
- "Adding Value for Clients by Weaving Asset Protection into Estate Planning," presented to the Southern Utah Estate Planning Council, October 2016
- "Estate Planning with Portability and Asset Protection Trusts," presented to the Soltis 9th Annual Client Appreciation and Wealth Management Conference, September 2015
- "The New Normal: Some Practical Thoughts on Estate Planning After the American Taxpayer Relief Act of 2012," presented to the Southern Utah Estate Planning Council, April 2015
- "Winning at Non-compete Agreements: Tips for Drafters and Litigators," presented to the Southern Utah Bar Association 12th Annual All-Day CLE, December 2014
- "Planning Strategies for Buy-Sell Agreements," presented to the Southern Utah Estate Planning Council, January 2014
- "Estate and Asset Protection Planning Concepts for Business Attorneys," presented to the DJP Business and Finance Section, May 2013
- "Estate Planning Law Update," presented to the Utah Association of CPAs, Southern Utah Chapter, May 2011
- Panel participant regarding Estate Tax Law Updates, presented to the Southern Utah Estate Planning Council, March 2011

Memberships

- Member of STEP (Society of Trust & Estate Practitioners), a group of international estate planning professionals
- Member of the Dixie State University Planned Giving Advisory Council (2015 – Present)
- Member of the Intermountain St. George Hospital Planned Giving Advisory Council (2015 – Present)
- President (2018) and Member of the Board of Directors (2014-2019) of the Southern Utah Estate Planning Council
- Member of the Board of Directors of George Washington Academy (2011 – Present)
- Participant in an Ad Hoc Committee on Legislation of the Estate Planning and Elder Law Sections of the Utah State Bar regarding revisions to Utah’s asset protection trust laws (2013)
- Former Missionary for the Church of Jesus Christ of Latter-day Saints, serving in Rio de Janeiro, Brazil
- Member of the J. Reuben Clark Law Society
- Admitted to Utah State Bar (2009), Nevada State Bar (2010), Arizona State Bar (2011) and State Bar of California (2011)

Prior and Present Employment

- Judicial Externship, 4th District Court, Utah, Presiding Judge Pullan, 4th District Court, Utah, Presiding Judge Pullan Sep 2008 – Dec 2008, Provo, Utah

Areas of focus

Practices

- Estate and Trust Administration
- Estate and Trust Planning
- Asset Protection
- Franchising and Distribution

Education

- Brigham Young University, 2009, J.D., Law
- Southern Utah University, Master of Accountancy

Admissions and qualifications

- Arizona
- California
- Nevada
- Utah

Languages

- Portuguese