**George Maurice Burnette Jr.**

gmburnettejr@gmail.com Phone (919)417-1386 610 Frank Street · Raleigh, NC 27604

**Work Experience**

**Senior Associate, Advanced Planning & Complex Asset Group Fidelity Charitable** February 2017 – Present

* Facilitate the charitable contribution of non-publicly traded/non-cash assets (including, but not limited to S Corporations, C Corporations, Limited Liability Companies, Limited Partnerships, Private Equity/Hedge Fund/Venture Capital interests, as well as, residential and commercial real estate); worked on gifts totaling over $50M in total assets in 2017
* Work closely with donors and their advisors to provide technical expertise and advisory resources before, during, and after the gifting process to ensure that donors achieve the most favorable tax treatment with the greatest charitable impact
* Conduct legal, compliance, and financial based review and due diligence related to gift taxation, risk management, and various transactional structures in correlation to gift and exit strategy including mergers & acquisitions, real estate transactions, buy-sale agreements, and testamentary planning
* Conduct cross-functional data analysis to help drive business group mission and goals
* Serve as a member of the Grant Oversight Review Committee, a group dedicated to insuring compliance with the Charity’s grant making policies and mission statement, as well as, the Federal Tax code
* Collaborate with organizational stakeholders and marketing executives to create and execute various educational modules, speaking engagements, and publications for use both internally and externally.

**Assistant Treasurer for Freeman for District Attorney – Raleigh, NC** January 2014-Present

* Prepare and generate data for required campaign finance reports, amend audited reports and work with the North Carolina campaign finance software to generate required disclosures.
* Ensure compliance with North Carolina and Federal campaign finance laws and further goals of the campaign as a whole.
* Assist with multifaceted statewide fundraising efforts including, grassroots organization, solicitation of potential donors, and event planning.

**Attorney at Hemphill, Gelder & Monroe, P.C. – Raleigh, NC** September 2014-February 2017

* Advised clients on various estate planning matters, business planning tools, and tax strategies to effectively plan for a variety of issues including intrafamily transfers, estate taxes, charitable giving, closely held business interests, employee benefits and insurance.
* Drafted various types of transactional and planning documents including complex wills, living trusts, trusts for minors, insurance trusts, corporate documents, and contracts to effectively meet client goals.
* Advised tax exempt entities on by-laws and board policies.
* Assisted with estate administration and litigation, including discovery, forensic accounting and financial analysis.
* Generated growth and new business in North Carolina and other markets by leveraging contacts and establishing personal relationships with financial advisors, trust companies, insurance agents, and other wealth management professionals to provide a holistic approach when advising clients.

**Managing Attorney at Anglin Law Firm, PLLC – Raleigh, NC** November 2013-September 2014

* Managed small general practice involving civil and criminal matters in small claims, district and superior courts. Practice

areas included contract planning, estate planning and administration, residential real estate matters, personal injury litigation, employment law and administrative appeals.

* Supervised interns and administrative staff; allocated firm finances to enhance profitability; implemented new legal and ethical safeguards.
* Generated revenue growth and new business through cost effective and financially responsible marketing initiatives.
* Spring Intern 2012.

**Contract Attorney at Synergy Legal Staffing – Raleigh, NC** October 2013-February 2014

* Assisted with pre-litigation discovery by reviewing, categorizing, and prioritizing documents based on importance, responsiveness and privilege as indicated in relevant discovery requests.

**Summer Intern at Adams, Howell, Sizemore & Lenfestey P.A. – Angier, NC** May 2012-August 2012

* Drafted corporate documents, restrictive covenants, contracts, estate planning instruments and assisted with various real estate and other general practice matters including basic criminal practice.

**Campbell University Admissions/Financial Aid Office Assistant – Raleigh, NC** September 2011-May 2012

* Provided administrative support and processed financial aid award notifications.

**Summer Intern North Carolina Office of the State Auditor – Raleigh, NC** May 2011-August 2011

* Researched general statutes and state policies; drafted and presented memoranda on vital state auditing issues.

**Licenses/Certifications**

North Carolina, 2013

**Publications**

“Lawyers Conference Hosts Two Successful Membership Receptions in North Carolina.” Judicial Division Record. Volume17, Issue 2, Winter 2014.

**Presentations**

* “457A Driving Impact & Charitable Opportunity.” June 1, 2017. Moderator;
* “Ask the Experts: Strategies and Tactics for Using Complex Assets for Charitable Giving.” July 26, 2017. Moderator/Presenter;
* “United Capital Guidance Forum: Ask the Experts.” September 18, 2017. Moderator/Presenter.
* “Complex Assets: Deeper Dive.” Internal training for new associates. Quarterly. Presenter.

**Pro Bono/Community**

Campbell Law Alumni Board (member, Membership Subcommittee); Hayes Barton United Methodist Church Outreach Committee (member; ZOE Ministries, Disaster Relief, and Budget Subcommittees); Hayes Barton United Methodist Church Haiti Mission Steering Committee (Grant Application Author); North Carolina Bar Association; Wake County Bar Association; Campbell Senior Law Clinic; Campbell Law Panama Mission Trip, May 2013; Campbell Law Pro Bono Council – Winter/ Spring Break Clinical Coordinator; University of Memphis School of Law Alternative Spring Break (family law project)

**Education**

**Campbell University Southeastern Trust School** June 2014

* Investment, retirement, estate and tax planning program: fiduciary law, income taxation, estate taxation, estate planning, administration, investments, financial planning, employee benefits, selling/client relationships, operations, and compliance.

**Campbell University Norman Adrian Wiggins School of Law**

Juris Doctor May 2013

* Richard A. Lord Intramural Moot Court Competition; Kilpatrick Stockton 1L Mock Trial Competition; Campbell Law Student Bar Association Representative

**University of North Carolina at Chapel Hill**

Bachelor of Arts in Peace, War, and Defense May 2010
Bachelor of Arts in History

**References**

Ryan Boland

Vice President-Fundraising Manager, Eastern Division

Fidelity Charitable

Ryan.Boland@fmr.com

(617) 875-8810

Lorrin Freeman

Wake County District Attorney

(919) 792-5000

John “Jay” Hemphill

Hemphill Gelder & Monroe, PC

jh@hgmlawnc.com

(888) 443-1446