RYAN L. MONTGOMERY

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LEGAL EXPERIENCE

Montgomery Purdue PLLC
Seattle, Washington
Attorney since 2003, and Partner since 2010

A Top Rated Estate Planning & Probate Attorney in Seattle and Super Lawyer (2022 - 2024), Rising Star (2010-2012, 2015-2018) - SuperLawyer

10.0 Superb Rating - AVVO

PRACTICE AREAS

Estate Planning and Probate

Ryan Montgomery is the fourth generation of his family to practice law at Montgomery Purdue PLLC. Ryan's practice focuses on trust and estate planning, wealth transfer planning, business succession planning, and trust and estate administration. Ryan also counsels clients regarding all types of property status agreements, including prenuptial and postnuptial agreements. Ryan also has extensive experience assisting business owners with implementing non-qualified deferred compensation arrangements under Internal Revenue Code Section 409A.

Ryan's estate planning practice includes an emphasis on effectively utilizing estate and gift tax exemptions and exclusions through the use of family entities (for example, Limited Liability Companies), irrevocable lifetime gift trusts, Grantor Retained Annuity Trusts (GRATS), life insurance planning, multiple generation planning, and retirement account beneficiary planning. Ryan's clients come from all backgrounds and industries, and include business owners and executives, medical and dental (and other) professionals, and real estate investors and developers.

EDUCATION

UNIVERSITY OF WASHINGTON SCHOOL OF LAW – SEATTLE, WA
Legum Magister in Taxation, 2004
Juris Doctor with Honors, 2003

UNIVERSITY OF WASHINGTON – SEATTLE, WA
Bachelor of Arts, Political Science, 2000

ADMISSION AND MEMBERSHIP

Washington State Bar Association Real Property, Probate and Trust Section Probate and Trust Council Director 2024-2025

Washington State Bar Association Real Property, Probate and Trust Section Probate and Trust Council Member 2022-2023

Member – **Washington State Bar Association**
Member – **King County Bar Association**
Member – **Seattle Estate Planning Council**

SELECTED PUBLICATIONS AND PRESENTATIONS

Co-Author, "Shannon Pratt's The Lawyer's Business Valuation Handbook: Understanding Financial Statements, Appraisal Reports, and Expert Testimony,"(3d ed. 2024), CHAPTER 20, "Valuations for Gift, Estate, and Charitable Contribution Matters" co-authored with Travis Harms, CFA, CPA/ABV.

Author, "The RCW 11.54 "Basic Award" Ambiguity," WSBA Real Property, Probate & Trust Section Newsletter – Vol. 50 (Number 1), Fall 2023

Author, Chapter 10A, "Estate Planning," Washington Lawyers Practice Manual, 2022, 2023, and 2024, King County Bar Association.

Co-Author, "Family Partnerships: Lessons from Estate of Purdue," Tax Notes – Vol. 181, October 2023

Co-author, "The Joint and Survivor Grantor Trust and the S Election," Tax Notes – Vol. 174, March 2022.

Author, "Retirement Account Beneficiary Designation Planning – Before and After the SECURE Act." Financial Planners Association of Puget Sound 2020 Symposium, March 2020.
Author, "Trusts – Recent Developments and Select Topics", South King County Estate Planning Council, April 2018.

Author, "The Estate Planner's Guide to the "Deal" – What Do I Need to Know When My Client Is Selling His/Her Business?," Washington State Bar Association Mid-Year Conference for Real Property – Probate and Trust Section, Summer 2017.