MIRICK O'CONNELL

ATTORNEYS AT LAW

ATTORNEY BIOGRAPHY

Allen J. Falke

Of Counsel

Tel: 508. 929.1649 | **Fax:** 508.463.1394 | **Email:** afalke@mirickoconnell.com

Worcester Office: 100 Front Street | Worcester | MA | 01608-1477

Legal Administrative Assistant
Lynn M. Burns

Tel: 508.929.1635 | Email: lburns@mirickoconnell.com

Practice Groups and Specialty Areas
Business
Tax
Trusts and Estates
Estate Planning
Probate Administration

Allen joined Mirick O'Connell as Of Counsel in June 2014. He is the practice group leader of the Firm's Trusts and Estates Group and a member of the Firm's Business group. He focuses his practice on tax law and estate and business planning. Allen provides estate planning for high-net-worth individuals and succession planning for business clients. He advises clients on tax matters related to business acquisitions and restructuring, and business formations and combinations. He reviews and advises clients on estate, gift, individual, corporate, partnership, and fiduciary tax compliance matters. He also has extensive experience representing clients on audits with taxing authorities.

Allen was included in the 2024 edition of *The Best Lawyers in America*® for Tax Law. He has been recognized in *The Best Lawyers in America*® since the 2022 edition. In addition, he was named the *Best Lawyers*® Tax Law "Lawyer of the Year" in Worcester, 2023.

Prior to joining the Firm, Allen practiced at Greenberg, Rosenblatt, Kull and Bitsoli, P.C.; CCR, LLP; and PricewaterhouseCoopers, LLP.

Publications/Presentations

- "To Protect Your Kids, Consider These Estate Planning Steps," *Kiplinger*, November 20, 2023
- "What to Discuss With Your Aging Parents as They Get Older," *Kiplinger*, July 17, 2023
- "Three Legal Documents Your Child Should Sign When They Turn 18," *Kiplinger*, May 12, 2023
- "To Gift or Not to Gift, That is the Question," *On Air with Mirick O'Connell* legal podcast (November 12, 2021)
- "Considerations for Parents as Children Turn 18," *On Air with Mirick O'Connell* legal podcast (September 30, 2021)
- "Estate Planning Techniques in a Low Interest Rate Environment," *On Air with Mirick O'Connell* legal podcast (August 31, 2020)
- Quoted in "How to Buy Property with a Spouse, Friend or Business Partner," US News & World Report, July 2016
- Quoted in "The Pros and Cons of Investing in a Vacation Home," US News & World Report, February 2016
- "Cutting Edge Issues in Central Massachusetts," MCLE Regional Estate Planning Conference, February 2016
- "Why Clients Should Think Twice Before Gifting Assets," Financial Planning Blog and On Wall Street, October 2015
- "Estate Planning Headaches to Avoid When Clients' Assets Span State Lines," Financial Planning Blog, September 2015

Education
JD, Western New England College School of Law (1996); CALI Excellence for the Future Award (Corporate Tax)

LLM in Taxation, New York University School of Law (2001)

BS, Worcester State College

Bar and Court Admissions
Massachusetts

Connecticut

Professional License

Certified Public Accountant (Massachusetts and Maryland)

Professional/Community Affiliations
Massachusetts Bar Association

Worcester County Bar Association

Greater Worcester Community Foundation, Corporator

Massachusetts Education and Career Opportunities, Inc., Treasurer

Worcester State Foundation, Director

Estate and Business Planning Council of Worcester, Treasurer

ATTORNEY BIOGRAPHY – ALLEN J. FALKE

Publications/Presentations (continued)

- "Drafting Trust Distributions," NBI, April 2015
- "Business Tax Considerations for 2015," Worcester Business Journal, February 2015
- "Cutting Edge Issues in Central Massachusetts," MCLE Regional Estate Planning Conference (February 2015)
- Quoted in "11 Things You Never Thought of When You Decided Not to Get Married," *Forbes,* September 26, 2014