Gregory S. Davis, Esq.

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Executive Summary

Exemplary client-oriented lawyer. Areas of expertise include real estate, estate planning and financial services. Core functional competencies include business development, due diligence, multi-faceted client engagement and investment management. Prior experience as trust leader for sixth-largest US bank holding company, providing deep advisory covering laws and options concerning trusts and estate matters. University of Pennsylvania (Wharton) undergrad, Bowie State MBA, Wiggins School of Law (Campbell University) JD

Business Formation	Real Estate Transactions	Contract Execution
Intellectual Property & Licensing	SaaS Agreements	Estate Planning

Professional Experience

The Law Office of Gregory S. Davis, PLLC, Wake Forest, NC (www.gsdavislaw.com) — **2022 - Present**

Boutique law firm and provider of comprehensive legal services covering Business Law, Real Estate and Estate Planning.

Owner

Business Law

- Draft Software as a Service (SaaS) and Licensing Agreements to protect client Intellectual Property
- Execution of end-to-end service offerings to support clients' entity establishment and objectives, including incorporations, franchise agreements, asset purchase, business acquisition, advisory on tax efficient business structures and contract review
- Draft well-crafted legal documents including commercial lease agreements, operating agreements and business succession plans
- Advise clients and accounting partners on different entities and financial structures for real estate holdings

Estate Planning

- Support the firm's practice by creating new products and intake processes supporting the development of wills, estate planning client engagement and risk mitigation related to digital assets
- Develop tax-efficient strategies utilizing trust structures, including QTIP trusts, A-B trusts, portability of estate tax exemptions and interval distributions for beneficiaries
- Host weekly "Will Wednesday" programming to discuss various estate topics related to LLC operation, trusts and probate
- Craft revocable and irrevocable trusts as well as complex wills

Real Estate

- Provide advisory on various legal structures for holding multiple real estate properties, including 1031 Exchanges
- Support the client property closing process by performing 30-year title searches for residential and commercial clients; and composing preliminary and final title opinions
- Partner with loan officers and title agencies to assist clients in navigating the mortgage closing process
- Engage in activities as the settlement agent for clients' real estate closings

Wake Tech Community College, Raleigh, NC — **2022 - Present**

Adjunct Professor of Business Law.

- 16 Week online course utilizing Blackboard and Microsoft Teams
- Emphasis on Contracts, Ethics, Negligence, Torts and Constitutional Rights
- Responsible for attendance, grading, posting assignments, office hours and offering positive feedback

TriCity Lawyers, Durham, NC — **2021 - 2022**

Law Associate

- Business Law: Incorporations and business succession planning
- Real Estate: Title Searches, Closing Document preparation and Residential Closings
- Estate Planning: Client intake, estate plan drafting and client document delivery

TRUIST, Raleigh, NC — 2012 - 2020

Truist, the sixth largest U.S. bank holding company.

Trust Officer, BB&T Retirement & Institutional Services — 2015- 2020

- Selected as part of Small Business Development team, supporting the business in its signature location

- Delivered retirement services to clients up to $3M AUM in their 401K plans
- Prepared analysis comparing mutual funds in client portfolios
- Leveraged CRM tools to support quarterly sales forecasts and updates to potential sales opportunities

Retirement Communications Specialist 2012-2015

- Delivered 401K education programming with proven strategies to increase plan participation, contributions and employee retention for plans with up to $20M
- Increased contributions by offering auto enrollment, auto escalation and investment guidance
- Initiated various participation campaigns that increased plan awareness and participation
- Recognized with an award for successful financial literacy delivery and impact

MEREDITH COLLEGE, Raleigh, NC 2012-2018

Meredith is a liberal arts college focused on educating and inspiring students to live with integrity
Adjunct Professor of Finance. Classes Include:

- Foundations of Finance: Corporate Transactions, SEC Reporting, M&A, Stock and IPO Valuation
- Investment and Portfolio Management: Capital Markets and Risk Management

NORTH CAROLINA COURT OF APPEALS, Raleigh, NC 2018

Summer Legal Externship with Judge Chris Dillon
Legal Extern - Collaborated with law clerks to write memos and draft legal opinions

EDUCATION

Norman Adrian Wiggins School of Law, Campbell University, Raleigh, North Carolina
Juris Doctor, with a focus on Venture Capital, Securities Law, Real Estate and Estate Planning

College of Business, Bowie State University, Bowie, Maryland
Master of Business Administration (MBA) with concentration in Finance

The Wharton School of Business, University of Pennsylvania, Philadelphia, Pennsylvania
Bachelor of Science in Economics, concentration in Operations + Information Management

PROFESSIONAL LICENSES & ACCREDITATIONS

- **Admitted to the North Carolina Bar,** May 2020
- **FINRA Dispute Resolution Arbitrator,** 2020
- **Series 65,** Uniform Investment Adviser Law, 2012
- **Accredited Investment Fiduciary**, 2020 from Fi360.com, A Broadridge Company
- **Certificate in Financial Planning**, Duke University

OTHER INVOLVEMENT

ABCs of Money for Girls and Boys (Author)
ABCs of Money for Girls and Boys introduces young children to a diverse group of kids (James, Denise and Arturo) who shares what they know about the basics of money. The goal is to give kids an introductory foundation for financial topics.

North Carolina Bar Association **2022**
Developed material to present a CLE class titled: Finance for Lawyers

Public Speaking: Money Talks @ Baptist Grove Church **2022**
Invited to join a panel discussion on budgeting and estate planning

Meredith College
Developed and present financial literacy programming for first year students as part of their Strong Point curriculum.

Healthy Kids Running Series, Volunteer

YMCA, Youth Team Soccer Coach