



# BAILEY | CAVALIERI

**Robert R Dunn**

MEMBER

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## OVERVIEW

Bob has been a member of the Trusts, Estates & Wealth Transfer Group at Bailey Cavalieri since its founding in 2003, where he also serves as the firm's Managing Director. His legal practice includes estate planning, wealth transfer, tax reduction strategies, estate and trust administration, and probate litigation. He is a fellow of the American College of Trust and Estate Counsel and is recognized in The Best Lawyers in America, Columbus CEO Top Lawyers, and Ohio Super Lawyers. Bob graduated from Vanderbilt University School of Law in 1991 and has been a member of several legal associations and boards. Bob's practical approach and attention to detail help his clients to achieve their planning objectives.

## EDUCATION

Vanderbilt University (J.D., 1991) Associate Editor, Vanderbilt Journal of Transnational Law  
*Johnson & Gibbs Appellate Advocacy Award*  
University of Kentucky (B.A., 1988, with Distinction)

## BAR ADMISSIONS

Ohio (1991)

## COURT ADMISSIONS

United States Court of Appeals, Sixth Circuit (2002)  
United States Tax Court (2000)  
United States District Court, Southern District of Ohio (1992)

## PROFESSIONAL HIGHLIGHTS

Representing an estate in the successful challenge to the Ohio Department of Taxation's attempt to decouple Ohio's additional estate tax from federal law.

Has handled several cases at the appellate level and before the Ohio Supreme Court.

## PUBLICATIONS & SPEAKING ENGAGEMENTS

Client Alert: American Taxpayer Relief Act of 2012

Client Alert: An Important New Asset Protection Tool: The Ohio Legacy Trust Act, March 2013

Client Alert: Estate Planning and Tax Issues after DOMA is Ruled Unconstitutional, August 2013

Client Alert: Happy New Year! The Death Tax Lives

Estate Planning and Administration in the Digital Age, September 2014

Tax Apportionment: How it Works, Why it Matters (Columbus Daily Reporter)

Premarital Agreements: Key Element of Effective Long-Term Financial Plan (Business First)

Estate Planning and Transfer Tax Updates: February 2009

Snowbirds Come Home: Tax Policy Revision Intended to Reverse Ohio Wealth and Talent Drain

Bob has given numerous presentations to the Columbus Bar Association and the Ohio State Bar Association, as well as to charitable entities including the Columbus Foundation, the Catholic Foundation, the Central Ohio Planned Giving Council, and the Columbus Jewish Foundation on topics such as gifting of retirement assets to charity, estate tax apportionment, Ohio estate tax issues, and qualified personal residence trusts.

## PROFESSIONAL RECOGNITION

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Peer Review Rated AV in Martindale Hubbell

Best Lawyers in America®, 2008-present (Trusts and Estates)

Columbus CEO Top Lawyer (Trusts and Estates)

Ohio Super Lawyers, 2023 -present (Estate Planning and Probate)

## AFFILIATIONS AND CIVIC INVOLVEMENT

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Fellow, The American College of Trust and Estate Counsel (ACTEC)

Certified Specialist in Estate Planning, Trust and Probate Law (Ohio State Bar Association)

Member, American Bar Association, Section of Real Property, Probate and Trust Law

Member, Ohio State Bar Association, Probate and Trust Law Section

Member, Columbus Bar Association, Probate Committee, Estate and Gift Tax Committee

Board of Directors of the Columbus Bar Services Agency, Inc.

Member, Columbus Estate Planning Council

Member, The Columbus Foundation Legal Advisory Committee

Member, The Catholic Foundation Professional Advisors Group

Board of Trustees, Mount Carmel Health System Foundation

Lawyers Club of Columbus (President, 2009)