



## Jeani Williams

Paralegal

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Jeani Williams is a seasoned estate and trust paralegal with a focus on fiduciary, estate, and gift tax matters. She provides comprehensive support in the analysis and administration of complex estates and trusts, offering in-depth knowledge of federal and state tax compliance. Jeani prepares and reviews key filings, including Forms 1041, 706, 709, and 990, while advising on tax strategies that help minimize liability and ensure regulatory compliance.

Working closely with attorneys, accountants, financial advisors, and fiduciaries, Jeani guides clients through estate planning and administration, from initial funding and distribution to post-mortem tax planning and resolution with the IRS. She is valued for her ability to simplify complex processes and deliver practical, client-focused solutions.

Outside the office, Jeani enjoys spending time with her five children and two grandchildren, traveling, relaxing by the beach or pool, supporting youth soccer, and staying active on her Peloton.

### Education

- Duke University (M.S.)
- Duke University (B.A.)
- Duke University
  - Paralegal Certification
- West Chester University (B.S.)
- Duke University, Online
  - Wills & Estates and Federal Tax Law Paralegal Specialist Certificate
  - Administrative Law Paralegal Specialist Certificate
  - Law Office Administration Paralegal Specialist Certificate

### Professional Affiliations

### Services

- Estates and Trusts

- Certified Paralegal, NALA
- Registered Paralegal, NFPA
- American Alliance Certified Paralegal, AAPI
- Notary Public, Delaware, Maryland and North Carolina
- Member, National Federation of Paralegal Association Voting Member AACP
- Court Appointed Child Advocate, Mecklenburg County Council for Children's Rights