

## C. Daniel Yates

### Profile

Dan Yates is a partner in the Estate and Wealth Transfer Planning Group. Mr. Yates counsels families, business owners, corporate executives and other individuals and businesses to formulate and achieve financial objectives. He provides clients with counsel regarding taxation, probate, philanthropic giving and other estate planning or business succession planning issues. Mr. Yates has practiced law since 1973 and is a Board Certified Indiana Trust & Estate Lawyer, certified by the Trust & Estate Specialty Board. He is extremely involved in various professional, civic and charitable organizations, and has received various awards, both for his professional qualifications and for his commitment to the community.

### Education

Indiana University School of Law - Bloomington (J.D., 1973)  
Indiana University (M.B.A., 1973)  
Indiana University (A.B., 1969)

### Honors / Awards

Dean's Advisory Council, Indiana University Herron School of Art and Design (2010); *Indiana Lawyer's* "Leadership in Law" Distinguished Barrister (2010); Distinguished Fellow of the Indianapolis Bar Association Award (2009); FIVE STAR Best in Client Satisfaction Wealth Manager Award (2009); Princeton Premier Business Leaders & Professionals Award (2009); Co-Chair of Indianapolis Symphony Orchestra Gala on September 26, 2009; Worth's Top 100 Attorneys in the Nation (2006-2009); Indiana University School of Law - Bloomington, Distinguished Service Award (2006); Strathmore's Who's Who; Marquis Who's Who (2008); Top Lawyers in America by Indiana Business (2008); The National Registry of Who's Who; Outstanding Lawyers of America; *The Best Lawyers in America*® (2008-2012); *Indiana Super Lawyers*® 2011 (Estate Planning & Probate); Fellow, Indiana Bar Foundation; Volunteer Fundraiser of the Year presented by the Association of Fundraising Professionals (2007); Partner in Philanthropy Award sponsored by the Central Indiana Community Foundation, Inc.; Seton Society of the St. Vincent Foundation

### Appointments / Memberships

**Professional Memberships:** The American College of Trust and Estate Counsel (ACTEC), (fellow); Indianapolis (Estate Planning and Administration and Taxation Sections) and Indiana State (Probate, Trust and Real Property and Taxation Sections) Bar Associations; Estate Planning Council of Indianapolis; Planned Giving Council of Indianapolis (Board of Directors); Indiana Bar Foundation (fellow); National Committee on Planned Giving; Phi Alpha Delta

**Civic and Charitable Activities:** Indiana University Herron School of Art (Advisory Board); Indiana University Center on Philanthropy (Board of Visitors); Eiteljorg Museum of American Indians and Western Art (Board of Directors, chairman of the Planned Giving Council, Executive Committee); Indianapolis Symphony Orchestra (Board of Directors, chairman of the Planned Giving Committee); Indianapolis Zoo (trustee, Advisory Board, Planned Giving Committee); The Children's Museum of Indianapolis (Board of Trustees, chairman of the Planned Giving Council); St. Vincent Hospital Foundation (Board of Directors and secretary); Central Indiana Community Foundation, Inc. (chairman of Asset Development Committee, Professional Advisor Leadership Council, past Board of Directors member and secretary); Legacy Fund Community Foundation (past chairman, member of the Board of Governors); Indiana University Center on Philanthropy (Indiana Philanthropy Council); Indiana University School of Medicine (Planned Giving Committee); Indianapolis-Marion County Public Library Foundation, Inc. (Planned Giving Advisory Board); Noble of Indiana (Planned Giving Advisory Board); D. J. Angus-Scientech Educational Foundation, Inc. (Board of Directors); Second Presbyterian Church (elder); Second Presbyterian Church Endowment Fund (counsel); Indiana University College of Arts and Sciences/Graduate School Alumni Association (past president); Day Nursery Foundation, Inc. (past Board of Directors member); American Lung Association of Indiana (past Board of Directors member)

**Business and Social Organizations:** Rotary Club of Indianapolis; Economic Club of Indianapolis; Scientech Club of Indianapolis, Inc. (past president and member emeritus); Contemporary Club of Indianapolis (Board of Directors); Indiana Society of Chicago; 500 Festival Associates; Maxinkuckee Yacht Club; Hillcrest Country Club; Columbia Club



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**Indiana University School Of  
Law - Bloomington**

### Admissions

Indiana