

J. Gregory Shelley

Profile

Greg Shelley is a partner with Bose McKinney & Evans LLP and a member of the Estate and Wealth Transfer Planning Group and the Business Services Group. Mr. Shelley concentrates his practice in the areas of wills, trusts, estate planning, trust and estate administration, will contests and trust disputes, guardianships, business succession planning and general business transactions. He also regularly represents corporate fiduciaries in trust and estate matters. Mr. Shelley is a Board Certified Indiana Trust & Estate Lawyer, certified by the Trust & Estate Specialty Board.

Education

Indiana University, Indianapolis (J.D., 1985)
Indiana University (B.A. with honors, 1982)

Honors / Awards

Indiana Super Lawyers® (2004-2009, 2011); *The Best Lawyers in America*® 2010, 2012;
AV® Peer Review rated by Martindale-Hubbell

Appearances / Publications

Mr. Shelley is a regular author, lecturer and moderator at legal education seminars for attorneys and accountants around Indiana. He has participated as chair, speaker or author of the following: "Practical Considerations When Funding Trusts with Real Estate" (ICLEF, 2000); "Focus on Trusts: Raising Red Flags; New Developments and Trends" (IBA Seminar, 2000); "Consequences of State Death Tax Credit Clause - Varying Results SDTCC's Have on Credit Trust Funding" (IBA Seminar, 1999); "Probate Assets: Identification, Valuation & Management Responsibilities" (ICLEF, 1997); "Tips for QTIPing IRAs" (IBA Seminar, 1996); "Family Limited Partnerships" (*Hoosier Banker* 1996); "Medicaid Update - Post OBRA'93" (IBA Seminar, 1995); "Valuation of Assets and Preparation of Inventories" (ICLEF, 1994); "Funding of Marital & Credit Shelter Trusts with Detailed Examples" (IBA Seminar, 1994); "Marital Deduction Formulae and Funding Clause Alternatives" (Bank One Trust Group Seminar, 1992); "Guardianships and Guardianship Alternatives" (I.B.A. Seminar, 1992)

Appointments / Memberships

Member: Indianapolis (Estate Planning & Administrative Section-Executive Committee, 1992-present, chair, 2002) and Indiana State (Probate, Trust & Real Property Section) Bar Associations; Estate Planning Council of Indianapolis; St. Luke's United Methodist Church; American Cancer Society - Great Lakes Division, Inc. (planned giving volunteer consultant).



gshelley@boselaw.com
T: 317.684.5250 (direct)
F: 317.223.0250 (direct)

111 Monument Circle
Suite 2700
Indianapolis, IN 46204
317.684.5000 Phone
317.684.5173 Fax

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