Marianne Ludlow helps clients pass down their assets smoothly and in a tax-advantaged way to create opportunities for future generations. She focuses her practice on estate, tax and asset protection planning for business owners, high-net worth families and families of more modest estate sizes.

Contact information
385.338.2545

mludlow@parsonsbehle.com

Capabilities
Trusts, Wills & Estates
Tax

Licensed/Admitted
Utah
Maryland (Inactive)
Virginia (inactive)

Marianne Ludlow

Shareholder | Lehi | Salt Lake City

Biography
Marianne combines the latest estate and business planning strategies with experienced counsel to provide clients with extraordinary legal services and top-notch client care. She secures and protects individuals, families, and businesses through the following:

- Wills and Revocable Trusts
- Irrevocable Trusts
- Asset Protection Planning
- Estate and Income Tax Planning
- Business Formation and Succession Planning
- Planning for Blended Families and Families with Special Considerations
- Trust Administration and Probate

Marianne is committed to not only drafting a personalized estate plan but also helping clients implement it. When she was just out of law school, her grandmother died. While she had a will and trust in place, the attorney had not helped her organize and transfer her assets into the trust. She and her dad spent many late nights locating disorganized assets and navigating probate. Also, even though her grandmother lived frugally, because she didn't have an ongoing relationship with her attorney, she never addressed tax issues that arose resulting in a large tax at her death.

Proper planning and implementation can help avoid these types of situations and can ease the burden of loved ones during difficult times. Marianne and her estate planning team provide clients with help, education and support with their estate plans so they can achieve their goals and have peace of mind and predictability for their loved ones and business.

Marianne currently serves as the president-elect of the Utah Bar Estate Planning Section, the president of the Utah Valley Estate Planning Council, and is a member of the National Association of Estate Planning Attorneys and Wealth Counsel. She regularly speaks on estate and tax planning, asset protection, business planning and trust administration to various organizations including the Utah Bar Estate Planning Section, the Utah Valley Estate Planning Council, Wealth Council forum, and at a variety of events for financial professionals and business owners. Following graduation from New York Law School, she served as a law clerk for the Hon. Howard D. McKibben of the United States District Court for the District of Nevada.

Accomplishments

Professional

Utah Bar Estate Planning Section Executive Committee

- Chair (2022-2023)
- Chair Elect (2021-2022)
- Secretary/Treasurer (2019-2020)
- Program Chair (2018-2019)

Utah Valley Estate Planning Council

Academic

George Mason University, 1997, J.D., High Honors (top 10%)

Brigham Young University, 1994, B.S. and B.A., cum laude (top 10%), Economics and Political Science

Associations

Professional

Utah State Bar Estate Planning Section (Chair, 2022 – 2023; Member, 2006 – present)

President, Utah Valley Estate Planning Council (2022 – 2023)

Utah State Bar Business Law Section (2006 – present)

Utah County Estate Planning Council (2017 – present)

National Association of Estate Planners & Councils (2017 – present)

Community

Past Chair and Board Member, Ignite Entrepreneurship Academy (a K-8 charter school focused on innovative and interactive education located in Lehi, Utah)

Articles

“New Administration: Plan Now to Reduce Future Estate Taxes,” December 2020

"Wealth Transfer Strategies to Consider in an Election Year," October 2020

"Four Ways to Legally Protect Yourself During Covid-19," April 2020

"Keeping a Trust Secret Could Violate Utah Law," September 2018

"Powers of Attorney – What Type Do You Need," August 2018

"Use the Proper Tools to Fix a Broken Trust," July 2018

"Four Estate Planning Techniques for Blended Families," May 2018

Presentations

"Protecting Your Family and Business Through Legal Planning," February 2022

"Charitable Planned Giving with Retirement Assets – Tax Implications and Considerations," November 2021

"Top 10 Estate Planning Mistakes and How To Avoid Them," October 2021

"Critical Estate Planning Groundwork in Light of Proposed Tax Changes," May 2021

"Identifying Asset Protection and Tax-Planning Opportunities for Clients," April 2021

"So You're a Trustee: Now What? Advice and Tips for Current and Successor Trustees," September 2020

"Highlights from Heckerling Estate Planning Conference," March 2019

"Protecting and Planning For Inherited Retirement Assets," December 2018

"The Five Biggest Mistakes Business Owners Make and How to Avoid Them," December 2018