Diane B. Burks

Partner

Private Wealth

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Diane Burks advises her clients on matters related to tax and wealth transfer planning, estate and trust administration, business succession planning and charitable giving. Diane creates comprehensive estate plans for her clients so they can preserve their family's wealth for successive generations, while minimizing transfer and income taxes, integrating the client's personal non-tax goals and striving to ensure that her clients understand their planning.

Sophisticated estate and tax planning

Diane uses her extensive knowledge of transfer tax planning and her understanding of a client's goals to create a comprehensive and tax-efficient estate plan that takes the family's personal circumstances into account. Diane's clients appreciate how Diane can break down complicated tax and legal issues and her desire for her clients to understand their planning.

Diane works with her clients to create comprehensive estate plans, which may include wills, revocable trusts, irrevocable dynasty trusts, limited liability companies, shareholder agreements, marital agreements, irrevocable life insurance trusts (ILITs) and modification or reformation of existing irrevocable trusts. Diane also structures and implements lifetime and testamentary wealth transfer strategies such as grantor retained annuity trusts (GRATs), spousal lifetime access trusts (SLATs), and gifts and sales to dynasty trusts.

Diane also counsels clients on charitable objectives, including the creation, administration and termination of charitable trusts, and the creation and administration of public charities, private foundations and other tax-exempt organizations. She also represents executors, personal representatives, trustees and beneficiaries in probate and trust administration, as well as post- mortem planning. Diane routinely advises executors on estate administration, including the preparation and filing of probate documents, the transfer of assets, and the preparation and filing of estate and gift tax returns.

Additionally, Diane counsels business owners on business succession planning by drafting and reviewing organizational documents, operating

Practices

- Business Succession Planning
- Charitable Planning, Philanthropy and Nonprofit Organizations
- Corporate
- Private Wealth

Industries

- Private Client Services

Education

- JD, Wake Forest University School of Law, *magna cum laude, Order of the Coif*
- BA, Duke University

Bar Admissions

- North Carolina
- South Carolina

Community Involvements

- Mecklenburg County Bar, Leadership Institute
- North Carolina Bar Association
- South Carolina Bar
- Charlotte Estate Planning Council

agreements, shareholder agreements and buy-sell agreements, as well as implementing gifts or sales of business interest to irrevocable trusts.

Recognitions

Recognized or listed in the following:

- *Business North Carolina*
  - Legal Elite Young Gun, 2017, 2024
- *Chambers High Net Worth*
  - North Carolina: Private Wealth Law, 2024-2025
- *Charlotte Business Journal*
  - 40 Under 40, 2019
- Katten Muchin Rosenman LLP Pro Bono Service Award
  - 2011
- *Super Lawyers Rising Stars*
  - North Carolina, 2017
- *The Mecklenburg Times*
  - 50 Most Influential Women, 2016

News

- Katten Honored in *Chambers High Net Worth* 2025 for Private Wealth Excellence (July 24, 2025)
- Katten Named Leader in *Chambers High Net Worth 2024* Guide (July 18, 2024)
- Katten Names New Partners (July 26, 2022)
- Diane Burks Named 40 Under 40 Winner by *Charlotte Business Journal* (May 10, 2019)
- Katten Attorneys Recognized in 2017 North Carolina *Super Lawyers*, Rising Stars Lists (January 20, 2017)
- Diane Burks Recognized as One of the *Mecklenburg Times* "50 Most Influential Women" (May 24, 2016)
- Katten Announces Recipients of 12th Annual Pro Bono Service Awards and Special Pro Bono Leadership Award (July 6, 2011)
- Associate Diane Blackburn Authors Article in *North Carolina Lawyers Weekly* on Estate Tax Deferral (July 20, 2009)

Publications

- 2025 – 2026 Planning Priorities (November 19, 2025)
- The One Big Beautiful Bill Act: Key Year-End Tax Changes for Private Wealth Clients (November 19, 2025)
- Planning Considerations for the Rest of 2025 and Into 2026 (November 19, 2025)
- Select Updates Impacting Family Business Owners (November 19, 2025)
- Select Federal Caselaw Updates (November 19, 2025)
- Relevant International Updates (November 19, 2025)
- State of the States (November 19, 2025)
- 2024 Year-End Estate Planning Advisory (November 26, 2024)
- 2023 Year-End Estate Planning Advisory (November 20, 2023)
- 2022 Year-End Estate Planning Advisory (November 17, 2022)
- 2021 Year-End Estate Planning Advisory (November 22, 2021)
- Proposed Tax Legislation Would Dramatically Impact Private Wealth Planning (September 24, 2021)
- 2021 Biden Plan Estate Planning Advisory (January 15, 2021)
- 2020 Year-End Estate Planning Advisory (November 24, 2020)
- 2019 Year-End Private Wealth Advisory (November 25, 2019)
- Katten Team Publishes 2018 Year-End Estate Planning Series (December 4–7, 2018)
- 2018 Year-End Estate Planning Advisory (November 19, 2018)
- The Tax Cuts and Jobs Act: Gift, Estate and Generation-Skipping Transfer Tax Reform (February 28, 2018)
- 2017 Year-End Estate Planning Advisory (November 20, 2017)
- Self-Settled Asset Protection Trusts (December 2016)
- 2016 Year-End Estate Planning Advisory (November 21, 2016)
- Understanding Grantor Trusts (November 2016)
- North Carolina Estate Administration Manual (2016 Supplement)
- 2015 Year-End Estate Planning Advisory (November 23, 2015)
- Eight Key Estate Planning Opportunities Arising from the Supreme Court's Decision on Same-Sex Marriage (June 29, 2015)

- 2014 Year-End Estate Planning Advisory (November 26, 2014)
- IRA Rollovers: Practical Advice When Seeking a Waiver of the 60-Day Rollover Period (January/February 2014)
- 2013 Year-End Estate Planning Advisory (November 2013)
- Estate Planning Opportunities Arising from Recent Revenue Ruling Concerning Marriages of Same-Sex Couples (September 3, 2013)
- Estate Planning Opportunities Arising from Recent Landmark Supreme Court Decisions Concerning Marriages of Same-Sex Couples (June 28, 2013)
- Estate Planning After the Fiscal Cliff Deal (January 16, 2013)
- 2012 Year-End Estate Planning Advisory (November 20, 2012)
- Structuring an Endowed Nonprofit (March 16, 2012)
- Senior Citizen Handbook: Laws and Programs Affecting Senior Citizens in North Carolina (January 1, 2012)
- 2011 Year-End Estate Planning Advisory (November 23, 2011)
- House Votes 277-148 to Approve Senate Tax Cut Extension Bill (December 17, 2010)
- 2010 Year-End Estate Planning Advisory (November 2010)
- 2010 Estate Tax Planning Strategies—Once-in-a-Lifetime Opportunities vs. Potential Traps for the Unwary (September 21, 2010)
- HIRE Act Affects Foreign Trusts and Imposes Additional Requirements on US Persons with Foreign Accounts (March 24, 2010)
- US Government Acts Quickly to Help Haiti with Tax Benefits for Donors (February 2, 2010)
- Hooray, There's No Estate Tax: Now What Do I Do? (January 7, 2010)
- Possible One-Year Elimination of Estate and Generation-Skipping Transfer Tax in 2010: Going, Going, Gone? (December 23, 2009)
- 2009 Year-End Estate Planning Advisory (December 2009)
- Changes to New York Powers of Attorney Effective September 1 (July 28, 2009)
- Estate Tax Deferral May Be Beneficial for Real Estate Assets (July 20, 2009)
- 2008 Year-End Estate Planning Advisory (December 2008)

- New Expatriation Legislation Passed Unanimously by Congress and Signed by President (June 2008)