

# 2019 Closely Held Business Summit

## Ward and Smith Speakers

**Lauren Taylor Arnette, Family Law Attorney**  
**[lta@wardandsmith.com](mailto:lta@wardandsmith.com)**  
**252.672.5461**

Lauren leads the Family Law practice and is a North Carolina State Bar Board Certified Specialist in Family Law. Her experience encompasses various areas of civil litigation with a primary focus on complex familial issues. Her practice includes premarital and post-marital agreements, complex equitable distribution, custody and child support litigation, and adoption. Lauren routinely represents and counsels clients on financial family-related issues involving business valuations, pension valuations, military retirement division, Qualified Domestic Relations Orders, real property appraisals, and division of executive benefits. She also has extensive experience with interstate custody and jurisdictional issues, high conflict custody cases, custody evaluations, and adoptions.

Lauren handles litigation and non-litigation matters involving mediation, arbitration, premarital and post-marital agreements, separation agreements, and surrogacy agreements. She also represents clients before the NC Court of Appeals and NC Supreme Court on family-related cases after final judgment at the trial court level. Lauren practices throughout Eastern North Carolina. Prior to joining the firm, Lauren was a law clerk to Judge J. Douglas McCullough of the North Carolina Court of Appeals.



### Did You Know?

Our Family Law team frequently represents individuals in complex equitable distribution cases, often involving substantial assets. Such assets may include ownership interests in valuable real estate and business entities, such as corporations and partnerships. In these types of cases we work directly with real estate appraisers and business valuation experts to assist us in making appropriate recommendations to our client.

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**Adam Beaudoin, Business Attorney**  
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910.794.4847

Adam's practice experience encompasses a broad range of business law and transactional matters, including preparation of all components of business entity formation, including articles of incorporation, articles of organization, bylaws, organizational minutes, shareholder agreements, operating agreements, and partnership agreements. He regularly advises business clients regarding corporate governance, procedural requirements, governing document amendments, and fiduciary duties. He also has experience preparing all components of nonprofit entity formation, including articles of incorporation, bylaws, organizational minutes, confidentiality policy, whistleblower policy, and documentation retention policy.

Adam also assists in the negotiating and drafting all components of contracts and purchase agreements, including stock, limited liability interest, partnership, and asset purchase agreements and in conducting business and non-profit director, shareholder, and member meetings. He has experience in the preparation of all components of franchise documents for franchisors, including franchise disclosure documents, franchise agreements, master franchise agreements, development agreements and in the preparation and negotiation of business and nonprofit mergers, including articles of merger and plan of merger.



### Did You Know?

Our law firm "grew up" in small towns across eastern North Carolina, serving family owned and locally managed businesses. Our attorneys regularly counsel owners, managers, stakeholders, and family members of small, mid-size, and large closely held businesses as they resolve the questions that keep them awake at night.



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**Angela Doughty, Intellectual Property Attorney**  
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252.672.5471

Angela is a North Carolina State Bar Board Specialist in Trademark Law and a Certified Information Privacy Professional - United States (CIPP/US) that serves as the firm's Director of Legal Process Management. She oversees several initiatives to optimize and increase the efficiency of the firm's legal services. In addition to adopting and executing practices, such as Legal Lean Sigma, Angela is responsible for moving the firm through the implementation of process improvement, design methodologies, and innovative technology.

In her Privacy and Data Security practice, Angela advises clients on all aspects of privacy and security regulations including evaluating and implementing compliance programs, responding to data breaches and security incidents, drafting privacy notices and policies, and negotiating consumer and vendor contracts. Her practice encompasses counsel on a wide variety of state and federal regulations such as Health Insurance Portability Act (HIPAA), Health Information Technology for Economic and Clinical Health (HITECH), Gramm-Leach-Bliley Act, the Fair Credit Reporting Action (FCRA), CAN-SPAM, Children's Online Privacy Protection Rule (COPPA), General Data Protection Regulation (GDPR), and other international data transfer mechanisms.



### Did You Know?

Our IP team provides comprehensive counsel and service to help clients of all sizes meet their diverse needs for the recognition, acquisition, and safeguarding of their intellectual property, and to address domestic and international intellectual property acquisition and licensing, development and management, and dispute resolution.





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**Brad Evans, Litigation Attorney and  
Co-Managing Director**  
[ebe@wardandsmith.com](mailto:ebe@wardandsmith.com)  
**252.215.4025**

Brad is one of the firm's Managing Directors. His experience encompasses various areas of civil litigation in both the federal and state courts. He has experience in all aspects of civil litigation, including depositions, hearings, mediations, arbitrations, jury trials, and appeals. Brad advises clients and litigates cases involving all forms of commercial, business, estate, professional licensing, and intellectual property disputes. He regularly represents contractors, subcontractors, and suppliers in construction litigation in state and federal courts.

He has litigated numerous matters concerning trade secret misappropriation and intellectual property infringement. He has handled numerous disputes for agribusiness entities, including corporate dissolution, contract, and antitrust disputes. Brad also has experience litigating corporate and partnership disputes before the North Carolina Business Court. He is a certified Superior Court mediator and has been rated by his peers as being "preeminent" in his respective fields of law.

### Did You Know?

We are committed to building and maintaining relationships with every client because we understand that every client has unique needs. We work to become fully acquainted with the management style and operations of our clients. This enables us to provide timely and effective legal services. We advocate a proactive and preventive approach to our clients' legal issues so that through proper planning and maintenance our clients can avoid legal difficulties and costs.



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**Merrill Jones, Business Attorney**  
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**252.215.4008**

Merrill's practice experience encompasses a broad range of business law matters, including start-up businesses, business transfers and acquisitions, transactional matters, and tax matters. He has extensive experience representing contractors, design professionals, and project owners in drafting and negotiating construction, design, and design/build contracts. His practice also includes the representation of health care organizations and their owners in corporate, transactional, and merger and acquisition matters.

Merrill assists hemp industry clients with the formation of companies, including negotiation of operating agreements and buy-sell agreements, preparation, and negotiation of hemp industry agreements, such as manufacturing agreements, as well as mergers and acquisitions and corporate finance. His peers have rated him as being "preeminent" in his respective fields of law. Merrill has been a Certified Public Accountant since 1994.

### Did You Know?

Our Business practice provides clients with a range of services from starting a business and handling daily legal concerns to dealing with complex matters such as mergers, acquisitions, and sales of businesses. We represent individuals and all types and sizes of associations, businesses, institutions, and proprietorships and serve local, regional, national, and international clients.

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**Deana Labriola, Business Attorney**  
**[dl@wardandsmith.com](mailto:dl@wardandsmith.com)**  
**919.277.9183**

Deana's practice encompasses a broad range of business matters, from drafting and negotiating corporate agreements and documents to managing all aspects of mergers, acquisitions, and debt and equity financing transactions for a variety of companies. She represents privately held companies, and assists them in all aspects of their business, from corporate governance and transactions to business structuring, development, and expansion opportunities. This includes serving as outside general counsel to a number of closely held companies inside and outside of North Carolina.

Deana serves as the Raleigh office's Geographic Team Leader, and leads the firm's Technology Practice Group by representing a number of local technology and biotechnology companies in their corporate needs. Deana is an experienced corporate transactional attorney, and has worked on mergers and acquisitions, and other debt and equity financing from the seller, buyer, investor or borrower side.



### Did You Know?

Our attorneys offer substantial knowledge and experience in structuring business entities; negotiating, drafting, and administering contracts and agreements; developing and administering executive compensation and other benefit plans; structuring relationships within businesses involving directors, officers, fiduciaries, partners, and general managers; assisting with risk management issues, financing and secured transaction, tax planning; and handling major structural changes.



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### Steve Long, Tax and Employee Benefits Attorney

[sblong@wardandsmith.com](mailto:sblong@wardandsmith.com)

919.277.9189

Steve Long leads the firm's Tax and Employee Benefits practice. He has extensive experience working with employers in banking, retail, and technology to establish and maintain retirement plans, executive compensation agreements, stock incentive plans and other employee benefits.

Steve also advises charities and other tax-exempt organizations regarding their IRC 403 (b) and IRC 457 retirement plans, as well as issues related to compliance with Internal Revenue Service and state regulations concerning executive compensation, fundraising and lobbying activities. Additionally, he counsels business owners and individuals in retirement and estate planning.



### Did You Know?

Attorneys in our Tax practice regularly advise clients on local, state, federal, and international tax matters. Such matters involve income, estate, gift, employment, excise, sales and use, property, and other taxes.

We also understand that compensation and benefit programs can play a critical role in providing a competitive advantage. By looking for creative opportunities in employee benefits, our Employee Benefits practice helps clients with strategies that directly support employer objectives well beyond employee recruitment and retention.



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## Ward and Smith Speakers

**April Mills, Client Service Executive**  
**[ammills@wardandsmith.com](mailto:ammills@wardandsmith.com)**  
**919.277.9170**

April Mills is a seasoned business development professional with more than 15 years of experience. She is responsible for introducing the firm to new clients and identifying additional lines of business from current clients. She works with attorneys in all five Ward and Smith locations to develop meaningful relationships in the Triangle, in addition to facilitating strategic partnerships with key community organizations.

Prior to joining Ward and Smith, April was a Senior Business Development Executive for Dixon Hughes Goodman, a Top 20 CPA firm. In that position, she worked with companies in industries including manufacturing and distribution; construction and real estate; technology and life science; financial institutions; dealerships; government contracting; healthcare; and non-profit.



### Did You Know?

At Ward and Smith, we work seamlessly as a single team by drawing on attorneys from different practice groups who are best qualified to address clients' problems. The firm has a strategic objective that at least two attorneys will have extensive, in-depth experience in each area of the law. This assures our clients that their distinct needs always are handled by someone with experience in their matters.



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**Steve Stephenson, Business Development Attorney**

**[hls@wardandsmith.com](mailto:hls@wardandsmith.com)**

**252.215.4004**

Steve is laser-focused on the firm's client relationships, and he no longer practices law regularly. Most of Steve's legal career was devoted to counseling business owners and managers, and other professionals, on a diverse range of legal and business issues. He has lectured extensively on business law, tax, and estate planning matters, and has authored articles on those subjects.

Steve presently is engaged in building and maintaining relationships with business managers and professionals across a broad range of industries. He also has been and remains involved in a array of civic, charitable, economic development, and philanthropic activities.



### Did You Know?

Ward and Smith supports the communities it works in by actively participating in numerous civic and nonprofit organizations. We take pride in our widespread outreach and encourage our attorneys and staff to devote time to meaningful causes. The firm takes pleasure in recognizing our employees' dedication to over 140 different organizations.

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**Matt Thompson, Trusts and Estates Attorney**  
[mwt@wardandsmith.com](mailto:mwt@wardandsmith.com)  
**910.794.4837**

Matt focuses his practice on estate planning and estate and trust administration issues. He has experience working with closely-held business owners on succession planning, tax, and other issues. Matt also represents clients regarding long-term care planning, disability issues, and guardianship matters.

He is certified by the North Carolina State Bar as a Board Certified Specialist in Estate Planning and Probate Law. Matt has prepared manuscripts for and presented at various continuing legal education programs related to estate planning, estate administration, and elder law.



### Did You Know?

Our Trusts and Estates practice provides estate planning, estate administration, and related services to individuals, charitable organizations, foundations, and corporate fiduciaries such as banks and trust companies. In addition to basic estate planning and administration, the group's representation of clients includes gift and estate tax planning, transition of family business planning, advice concerning the protection of family assets from exposure to future claims and liabilities (including divorce), strategies with retirement plans and IRAs, elder law planning, and many other estate planning-related areas.



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### Devon Williams, Labor and Employment Attorney

[ddwilliams@wardandsmith.com](mailto:ddwilliams@wardandsmith.com)

919.277.9132

Devon leads the Labor and Employment practice. Her practice focuses on a wide range of labor and employment issues, including wage and hour matters, federal contractor compliance, employment discrimination and harassment, employee discipline and termination, personnel policies, and background checks. In matters relating to employee benefits, she concentrates on issues confronting welfare benefit plans (such as medical, dental, and other plans) and their sponsors, including the provisions and impact of the Affordable Care Act.

As a member for the firm's Hemp Law practice group, Devon regularly assists clients in the agribusiness, hemp and CBD industries navigate the complexities of ever-changing labor and employment laws impacting their business, including helping clients ensure proper protection for their confidential and proprietary information. She also advises clients in other industries on the novel issues triggered by the legalization of hemp and CBD, particularly as it relates to traditional forms of drug testing and compliance with various state and federal drug testing requirements.

### Did You Know?

Our Labor and Employment practice serves clients from all areas of business — from Fortune 500 companies to mid-size and small employers. Clients include banking and financial institutions, medical practices, boat builders, communications companies, construction companies, distributors, educational institutions, food service companies, insurance companies, manufacturers, nonprofit organizations, public utilities, publishers, retailers, state and local governments, and technology companies.