



## Jonathan J. David

Shareholder

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As an experienced estate planning, probate and trust administration, business, and real estate lawyer, Jonathan (Jay) David focuses on providing high quality legal representation to help his clients achieve their objectives. He understands the importance of responding to a client's needs quickly and efficiently and will begin working for a client immediately upon being retained. His practice areas include:

- **Estate (and Lifetime) Planning:** Providing advice on and preparing a wide variety of lifetime and estate planning related documents including Wills, Trusts (Revocable, Irrevocable and Pet Trusts) Durable Powers of Attorney, Living Wills, Prenuptial and Postnuptial Agreements, and Trust funding documents.
- **Probate and Trust Administration:** Representing personal representatives in the administration of a decedent's probate estate and trustees in the administration of a decedent's trust.
- **Business Entity Selection, Organization and Planning:** Helping clients determine the right type of legal entity and structure for their business and preparing the formation documents.
- **General Business:** Serving as general counsel to businesses, which includes, advising on the governance, management and ongoing operations of the business entity, succession planning, as well as preparing contracts, buy sell agreements, applications for beer, wine and liquor licenses, and documents for merger and acquisition transactions.
- **Commercial and Residential Real Estate:** Preparing purchase agreements, conveyancing documents, mortgage and security documents, leases, and other real estate-related documents for both residential and commercial real estate.

His clients include:

- Dentists and dental practices

### PRACTICE AREAS

Estate Planning  
Trust & Estate Administration  
Entity Selection, Organization & Planning  
Real Estate Law  
Business Law  
General Counsel  
Business Contracts  
Business Succession Planning  
Trusts & Estates

### EDUCATION

Thomas M. Cooley Law School, J.D.,  
1981  
University of Michigan, B.A., 1978,  
*cum laude*

### BAR AND COURT ADMISSIONS

Michigan  
U.S. District Court for the Western  
District of Michigan

### HONORS & RECOGNITIONS

*Best Lawyers in America®* 2024  
(Trusts and Estates)



- Restaurants
- Retail businesses
- Real Estate professionals
- Health care professionals
- Automobile and boat dealerships
- Manufacturing companies.

In addition to his practice, Jay is a published author on estate planning issues. He regularly contributes a question-and-answer column through a nationally syndicated news service for senior publications.

In response to questions such as, "How can probate be avoided?", "How can I protect my pets?" and "How can I protect my family if something happens to me?", Jay wrote an e-book, *Estate Planning: You Have to Start in Order to Finish*. This e-book is free and available for download below.

A lifelong Grand Rapids resident, Jay is a writer, a voracious reader, a runner and a sports enthusiast. He is married to a dog and animal lover, and they have two adult children.

## **SPEAKING ENGAGEMENTS**

**Farm Succession and Estate Planning**, *Michigan Farm Bureau*, April 29, 2015

## **PUBLICATIONS**

**Should You Keep a Corporate Minute Book?**, *Foster Swift Business & Corporate Law News*, December 3, 2021

**Corporate Conundrums**, *Foster Swift Business & Tax Law News*, November 19, 2019

**Estate Planning for Small Businesses**, *Grand Rapids Business Journal*, July 20, 2019

**Estate Planning: You Have to Start in Order to Finish**, 2019

**Legalease: Choosing Correct Power of Attorney for a "Control Freak"**, *West Michigan Plus*, March 28, 2016

**So That's What Those Legal Terms Actually Mean**, *go60.us*, July 2015

**How to Make Your Eventual Executor Less Stressed Out**, *go60.us*, April 3, 2015

**Intra-family Loans and IRS Interest Rate Rules**, *go60.us Legal Ease Column*, January 2015

**The Importance of a Corporate Record Book**, *Foster Swift Business & Corporate Law Report*, January 21, 2014

**OK to Disinherit a Child – Here's How to Handle It**, *go60.us Legal Ease Column*, September 2012

**This Nephew Won't Get What His Uncle Wants Him to Have**, *go60.us Legal Ease Column*, August 2012

**Why it Pays to be Proactive**, *go60.us Legal Ease Column*, August 2012

**Updating Your Estate Plans When Changes Happen**, *go60.us Legal Ease Column*, July 2012



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**The Four Must-Have Estate Planning Instruments**, *go60.us Legal Ease Column*, June 2012

## **MEMBERSHIPS & AFFILIATIONS**

### **Legal Affiliations:**

- Grand Rapids Bar Association
- Justice Foundation of West Michigan
- State Bar of Michigan

### **Industry & Professional Associations:**

- West Michigan Estate Planning Council, Past Board Member
- RunGR.com, Past Board Member
- ALS of West Michigan., Past Board Member

## **RECENT BLOG POSTS**

### **Estate Planning & Elder Law Blog**

Legal-Ease: Steps for When a Loved One Passes Away - Part One

Legal-Ease: What is the Downside of DIY Estate Planning?

Legal-Ease: What are my Responsibilities as Fiduciary of an Estate?

Parents: The Three Essential Legal Documents Your Child Should Have Before Leaving For College

Executing Estate Planning Documents Outside of Attorney's Office

When It Comes To Estate Planning, Coordination Is Key

Importance of Durable Powers of Attorney

Should Your Family Business Keep a Corporate Minute Book?

Survivor's Checklist: What to do When a Loved One Passes Away

Resource to Keep Senior Caretakers Organized

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