



David Frees, partner at Unruh, Turner, Burke &amp; Frees

# Leavings

David Frees: Wrote the book on succession at Unruh, Turner, Burke & Frees

**A**ttorney David M. Frees III believes in communicating with clients and in intergenerational family communications. In fact, he wrote the book on the subject: *The Language of Parenting: Building Great Family Relationships at All Ages*. He has a fan in Steve Forbes, editor-in-chief of *Forbes* magazine. Forbes has called David a “grand master” of family communication.

A partner with the Chester County law firm of Unruh, Turner, Burke & Frees, he has put his communication skills to good use. David estimates he has worked with 6,000 families while practicing trust and estates, wealth protection, elder law, and asset preservation.

“I have to communicate across the generations with parents, children, grandchildren. Clear communication is essential. There is a lot of planning involved in making sure the goals of the clients are attained. There are many subjects to consider, especially when you are planning for the next generation. You have to think about teaching the next generation how to build and keep wealth. You have to be concerned about litigation, taxes, and possible divorces in the family. We help families who are interested in protecting and passing on their financial wealth and their wisdom.”

The first step in the communicating process is obtaining a statement from the client of what is important to them and, especially if the children are young, what values the parents want instilled in them. “When an heir gains access to an inheritance is important. Too often, money is quickly spent or taken in a divorce. Through our customized planning process, a parent or grandparent can determine when and how much money is available to their heirs, at what age, and for

what purposes it can be used. Heirs are also given instruction on building and protecting wealth, the family’s business and personal values, and on philanthropy and charity donations in accordance with the client’s philosophy. We use special trusts to allow purchases while protecting them from divorce, taxation, and litigation.”

David and his firm use cutting edge technology to teach many of those lessons. They are experimenting with technology that allows parents and grandparents to leave communications to their children and grandchildren. Those statements are placed on audio and video clips. “This makes our approach to wealth planning, estate planning, and asset protection unique.”

David became a believer in communications while he was participating in an international Rotary student exchange program. “I was 16 years old and living in Phoenixville at the time. I went to New Zealand and Australia. The trip opened my eyes about effective communications. I had a chance to meet Sir Roy Jack, a New Zealand government leader. I spoke to him, and he took a liking to me.”

Also, David grew up in a family that communicated. “My parents were great mentors. Our family environment encouraged communications, and it made me comfortable in community settings. They were very active in Phoenixville and Chester County.”

David’s training in communications helped him during his time at Dickinson College, London University, and the University of Pennsylvania Law School. “I took every estate planning, wills, and estate tax class I could. They were small classes as not many people were interested in studying estate taxes. I remember many of my classmates would sit in

class and hold their heads and rock back and forth because of the subject matter, but it all made sense to me.”

David began his career as a litigator in a big city law firm but soon moved back to Chester County to begin a solo practice to concentrate on estates, trusts, and wills. “I help banks, and administrators handle trusts. They can go wrong. We can draft the legal documents that will minimize the likelihood of conflict. Family wealth preservation is also a piece of our service. With planning and training, people will behave more responsibly.”

For many, including personally for David Frees, philanthropy is important. “Children are directed to charities to support what interested their parents. The kids must also select charities that are important to them. They must have an interest in organizations they support. We work with the Chester County Community Foundation as a tool for teaching. We need to focus on the values of the family, and we have found our process highly effective.”

David has been active in the Chester County Community Foundation as a member of the board of directors and a past chairman of the board and past chair of the development committee. He also serves on the board of directors of Phoenixville Hospital and Phoenixville Federal Bank and Trust.

He heads his firm’s estate planning and wealth preservation practice and co-chairs the elder law solutions section of the firm. In addition to his law practice, David is chairman of Success Technologies. He has been on National Public Radio and is a frequent speaker in the area of trust and estate planning and administration, charitable giving, and communication and presentation skills.

“I guess I’m one of those rare birds who knew what I wanted to do when I was young. I knew what I wanted to practice in law school. When I went with a larger Philadelphia firm, one of the oldest in the nation, I loved working there, but I wanted to return to Chester County.”

The 20-member firm of Unruh, Turner, Burke & Frees was founded in 1990 and has offices in Phoenixville, West Chester, and Malvern.

When not practicing law, David writes and recently wrote a chapter for *Dream, Inc.*, a book that highlights area business leaders. He also has been hired by major companies to lecture on communications skills.

For relaxation, he likes to travel internationally with his family, his wife, Robin, and children, Joshua P.M. Frees, 21, Jamie Skylar Frees, 18, and Alexander J. Frees, 15.

“I also enjoy reading books and honing my skills.” He has also been known to combine traveling, teaching, and doing book signings.

David Frees is continuously communicating. 