

## William K. Roach

STAFF ATTORNEY

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With a keen eye toward the intricacies of tax law, William brings his background in financial planning to the table when guiding clients through trust and estate administration matters. He prides himself on helping clients achieve their financial goals and solidify their family legacy for future generations.

William spent over a decade working as a Wealth Advisor and Trust Officer at a state-chartered bank, where he gained comprehensive experience in basic estate planning, Qualified Terminable Interest Property (QTIP) marriage trusts, and complex business succession planning. During his tenure at the bank, William noticed how his clients relied on their estate planning attorneys to secure their financial success, which inspired him to attend law school. He earned his J.D. from the Campbell University Norman A. Wiggins School of Law, where he earned a Book Award in Estate Planning & Drafting, and his LL.M. in Taxation for the University of Florida Levin College of Law.

Outside of work, William enjoys woodworking, cooking, listening to a wide variety of music, and spending time with his wonderful wife, Chelsea.

### SERVICE LINE

Corporate, Tax & Transactions  
Taxation  
Wealth Strategies

### INDUSTRY SECTOR

Financial Institutions &  
Insurance

### PRIMARY LOCATION

Charleston, SC

## BAR & COURT ADMISSIONS

North Carolina

South Carolina