Shumaker

JULY 28, 2025 | NEWS

# William K. Roach Joins Shumaker, Bridging Financial Planning and Legal Strategy

CHARLESTON, SC —Attorney William K. Roach has joined Shumaker's Wealth Strategies Service Line, bringing a deep understanding of tax law and a client-centered approach to trust and estate administration.

### SERVICE LINE

Corporate, Tax & Transactions
Taxation
Wealth Strategies

### RELATED PROFESSIONALS

William K. Roach

### MEDIA CONTACT

Wendy M. Byrne
wbyrne@shumaker.com

With a background in financial planning and more than a decade of experience as a Wealth Advisor and Trust Officer at a state-chartered bank, William has developed a reputation for helping individuals and families navigate the complexities of estate planning, from foundational strategies to sophisticated succession planning for closely held businesses. His experience includes advising on Qualified Terminable Interest Property (QTIP) marital trusts, basic wills and trusts, and business continuity solutions designed to preserve wealth across generations.

"William's unique path from trusted advisor to attorney gives him a distinct perspective on the intersection of financial planning and estate law," said G.P. Diminich, Charleston Managing Partner and Wealth Strategies Regional Service Line Leader at Shumaker. "He's a valuable addition to our growing team and to the clients we serve."

William's firsthand experience working with estate planning attorneys during his time in banking sparked his decision to attend law school. He earned his J.D. from the Campbell University Norman A. Wiggins School of Law, where he was awarded the Book Award in Estate Planning & Drafting, and went on to receive his LL.M. in Taxation from the University of Florida Levin College of Law.

"I'm honored to join Shumaker's talented Wealth Strategies team," said William. "I'm passionate about helping clients achieve their financial goals while creating a legacy for future generations. Shumaker's multidisciplinary approach gives me the opportunity to offer well-rounded, strategic counsel to individuals, families, and business owners."

William's addition reflects Shumaker's continued investment in building a robust and forward-thinking wealth strategies practice, helping clients preserve, protect, and grow their assets with confidence.



Shumaker