ArentFox Schiff LLP
Attorneys

Kevin Matz

PARTNER AND FAMILY OFFICE INDUSTRY GROUP CO-LEADER

As a trusted adviser to clients with significant wealth, Kevin Matz, Partner at ArentFox Schiff focuses on domestic and international estate and tax planning, estate administration, and related litigation.



Industries

Family Office
— Distressed Family Debt
Media & Entertainment
Private Companies
Sports

Practices

Private Clients, Trusts & Estates
— Business Succession Planning
— Charitable Planning
— Estate Planning
— Probate, Estate Settlement & Trust Administration
— Qualified Opportunity Funds & Opportunity Zones
— Trust & Estate Disputes
— Wealth Transfer Strategies

Education

New York University School of Law, LLM, 1996
Fordham University School of Law, JD, 1993
City University of New York, BS, 1986

Offices

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Kevin counsels clients on wealth transfer planning; drafting wills and trusts; gift, estate, income, and generation-skipping transfer tax planning and tax return preparation; charitable gift planning; probate proceedings and estate administration; and associated litigation as well as corporate counseling.

Kevin often serves as outside general counsel to his high net worth clients and their family offices, and melds a unique combination of technical and practical excellence with outstanding skills as both a communicator and empathic listener.

Kevin advises clients on entity and succession planning, including family limited partnerships, grantor retained annuity trusts, transfers to irrevocable trusts involving complex valuations, irrevocable life insurance trusts, and the use of charitable vehicles, including private foundations, to further family planning and philanthropic objectives. More broadly, Kevin co-leads ArentFox Schiff's Family Office Industry Group and in this realm advises clients in structuring and administering family offices and in related dynastic planning for wealthy families, as well as in connection with business succession planning.

Kevin is a Fellow of the American College of Trust and Estate Counsel (ACTEC), for which he currently chairs its Washington Affairs Committee, having previously chaired ACTEC's Business Planning Committee, and also a certified public accountant, in which connection Kevin is currently the President of the New York State Society of Certified Public Accountants. Kevin is also the immediate past chair of the New York City Bar Association's Estate and Gift Taxation Committee, and the Chair-Elect of the New York State Bar Association's Trusts and Estates Law Section. A frequent speaker and author, Kevin presents at national industry conferences on the use of leveraged transfer techniques and estate planning for groups ranging from private equity fund managers and real estate investors to professional athletes and creative artists. Highly regarded by peers and clients, Kevin is ranked among industry leaders in the 2020 - 2025 Chambers High Net Worth guides, and was the Honoree at the UJA-Federation of New York Trusts and Estates Annual Event in June 2023 in recognition of his professional and philanthropic achievements and leadership.

In addition, Kevin is a recognized national leader in the area of qualified opportunity zone (QOZ) funds, and in July 2019 testified on ACTEC's behalf before the U.S. Department of Treasury concerning the proposed regulations on qualified opportunity funds. Kevin has also presented on QOZ funds and their estate planning considerations at several national conferences, including the renowned Heckerling Institute on Estate Planning and the Notre Dame Tax and Estate Planning

Institute.

Publications, Presentations & Recognitions

Publications

Kevin has authored a number of articles on estate and tax planning and estate administration. He has co-authored two estate planning treatises: *Manning on Estate Planning* (Practicing Law Institute, 2014) and *Estate Planning for Professionals – Understanding What is Needed for Estates of Any Size* (Cannon Financial Institute, 2009). Select publications include:

- "IRS Issues Transfer Tax Safe Harbor on Contributions to Trump Accounts that Treats Different Taxpayers Differently" *TaxStringer* (Jul. 28, 2026)
- "Bad-Facts FLP Causes Estate Tax Inclusion Under IRC Section 2036" *Wealth Management* (Jun. 24, 2026)
- "IRS Issues Initial Guidance on Trump Accounts," (co-author) *Wealth Management* (Dec. 17, 2025)
- "The Recent Amendment to NYTL 954(a)(3) Concerning the Addback for Certain Taxable Gifts Made Within Three Years of a Decedent's Death," *Trusts and Estates Law Section Journal*, NYSBA (Dec. 2025)
- "QOZ Planning Under the OBBBA," *TaxStringer,* NYCPA (Sept. 4, 2025)
- "Bad-Facts Family Limited Partnership Causes Estate Tax Inclusion," *Wealth Management* (Oct. 9, 2024)
- "AI in Family Offices: The Risks of Relying on AI for Decision-Making and Client Services,"? *The National Law Review* (Aug. 6, 2024)
- "AI in Family Offices: A Closer Look at Privacy, Confidentiality, and Fiduciary Responsibility,"? *Wealth Management* (Jun. 24, 2024)
- Recent Court Decision Highlights the Split In Authority Concerning the Estate Tax Treatment of Life Insurance Proceeds That Are Used To Fund a Corporate Redemption Obligation Under a Buy-Sell Agreement," *Trusts and Estates Law Section Journal,* New York State Bar Association (2023, Vol. 56, No. 4)
- "IRS Issues Proposed Regulations on Estate Administration Expenses and Claims," *Trusts and Estates Law Section Journal,* New York State Bar Association (Nov. 2022)
- "IRS Issues Proposed Regulations on Estate Administration Expenses and Claims," *TaxStringer* (Sep. 1, 2022)
- "The Deemed Realization Proposal in the Biden Administration's 'Green Book'," *TaxStringer* (Jul. 1, 2021)
- "Change in Control of Congress May Signal Seismic Shift in Future Estate Planning Opportunities," (co-author) *Stroock Client Alert* (Mar. 8, 2021)
- "A New Environment for Estate Planning Takes Shape in 2021," *TaxStringer* (Mar. 1, 2021)
- "IRS Extends COVID Relief for Qualified Opportunity Zone Funds and Investors," (co-author) *Stroock Client Alert* (Jan. 26, 2021)
- "IRS Issues Final Regulations on Carried Interests," *Wealth Management* (Jan. 22, 2021)
- "Final Regs. on Deduction of Administration Expenses of Estates and Non-Grantor Trusts," *TaxStringer* (Nov. 1, 2020)
- "IRS Notice 2020-39: Additional Opportunity Zone Relief Due to the COVID-19 Pandemic, " *TaxStringer* (Aug. 1, 2020)
- "How Final Regulations on Qualified Opportunity Funds Come Out on Trust and Estate Related Issues," *Estate Planning* (July 2020)
- "Protecting Yourself, Your Family, and Your Heirs during the COVID-19 Crisis," *TaxStringer* (Jun. 1, 2020)
- "The April IRS Guidance on CARES Act and Other Relief," *Stroock Special Bulletin* (Apr. 28, 2020)
-

"'Virtual Witnessing' of Wills, Lifetime Trusts, Health Care Proxies and Durable Powers of Attorney Is Allowed in New York State Through May 7, 2020," *Stroock Special Bulletin* (Apr. 8, 2020)

- "Additional COVID-19 Emergency Tax Relief From the IRS and New York State," *Stroock Special Bulletin* (Mar. 30, 2020)
- "How the Final Regulations on Qualified Opportunity Zones Come Out on Trust and Estate Related Issues," *Wealth Strategies Journal* (Mar. 27, 2020)
- "COVID-19 Emergency Tax Relief – The IRS Postpones Certain April 15 Income Tax Deadlines to July 15, and New York State Announces That It Will Follow Suit," *Stroock Special Bulletin* (Mar. 23, 2020)
- "Governor Cuomo Authorizes 'Virtual Notarization' Until April 18," *Stroock Special Bulletin* (Mar. 20, 2020)
- "Final Regulations on Qualified Opportunity Funds: Trust and Estate Issues," *TaxStringer* (Feb. 1, 2020)
- "Federal Estate, Gift and GST Tax Exemptions Continue Their Upward Surge to $11,580,000," *Stroock Special Bulletin* (Jan. 7, 2020)
- "IRS Issues Final Opportunity Zone Regs," *Wealth Management* (Jan. 2, 2020)
- "Stroock's Deep Dive Into the Final QOZ Regulations," *Stroock Special Bulletin* (Jan. 2, 2020)
- "SECURE Act Passed in Year – End Spending Package," *Stroock Special Bulletin* (Dec. 23, 2019)
- "The Latest Proposals on Qualified Opportunity Zone Businesses," *TaxStringer* (Nov. 4, 2019)
- "Opportunity Zones for Operating Businesses," *Stroock Special Bulletin* (Aug. 7, 2019)
- "SEC Clarifies: No Special Treatment for Qualified Opportunity Zone Funds," *Stroock Special Bulletin* (Jul. 24, 2019)
- "They're Out! Stroock's Take on the Second Set of Proposed QOZ Regulations," *Stroock Special Bulletin* (Apr. 19, 2019)
- "New York Retroactively Reinstates Its Estate Tax Clawback for Certain Taxable Gifts Made Within 3 Years of Death," *Stroock Special Bulletin* (Apr. 15, 2019)
- "Popular Wealth-Transfer Techniques to Leverage Exemptions Remain Viable," *Wealth Management* (Mar. 4, 2019)
- "A Seismic Shift in the Estate-Planning Landscape," *Wealth Management* (Feb. 12, 2019)
- "Federal Estate, Gift and GST Tax Exemptions Skyrocket to $11,400,000," *Stroock Special Bulletin* (Jan. 8, 2019)
- "Qualified Opportunity Zones: More of Your Questions Answered," *Stroock Special Bulletin* (Nov. 27, 2018)
- "Six Burning Questions on the New Qualified Opportunity Zone Guidance," *Stroock Special Bulletin* (Nov. 6, 2018)
- "After the Lender Case — Securities Law Restrictions That Apply to Family Offices Managing Other People's Money," *Stroock Special Bulletin* (Nov. 6, 2018)
- "Stroock's Take on the New 'Qualified Opportunity Zone' Guidance," *Stroock Special Bulletin* (Oct. 19, 2018)
- "When Opportunity Knocks to Defer Tax on Gains: 'Qualified Opportunity Funds'," *TaxStringer* (Aug. 1, 2018)
- "When Opportunity Knocks to Defer Tax on Gains – 'Qualified Opportunity Funds'," *Stroock Special Bulletin* (Jul. 17, 2018)
- "The Lender Case: Potential Avenue for Family Offices to Obtain Trade or Business Expense Deductions for Rendering Investment Management Services," *Stroock Special Bulletin* (Jun. 18, 2018)
- "Does Lender Management Provide Family Offices with a Roadmap for Obtaining an IRC section 162 Trade or Business Expense Deduction in Connection with Providing Investment Management Services?" *TaxStringer* (Jun. 1, 2018)
-

"Pass-Through Deduction Primer," *Wealth Management* (Mar. 16, 2018)

- "A Major Change in Planning with Limited Entities," *Wealth Management* (Mar. 2, 2018)
- "Gifting Opportunities Under the New Tax Law," *Wealth Management* (Mar. 2, 2018)
- "Increased Exemption Amounts: Use Them or Lose Them?" *Wealth Management* (Feb. 26, 2018)
- "How the 2017 Tax Reform Act Affects Estate Planning for High-Net Worth Individuals," *TaxStringer* (Feb. 1, 2018)
- "Trump's Tax Plan Raises Questions for Estate Planners," *Wealth Management* (Apr. 29, 2017)
- "Basis Consistency and Reporting for Property Acquired from a Decedent," *Wealth Management* (Mar. 2, 2017)
- "QTIP Trusts: Getting in Tune with the Times," *Wealth Management* (Feb. 21, 2017)
- "Reimagining Estate Planning in 2017: Part 1," *Wealth Management* (Feb. 10, 2017)
- "A View from the Audience at Heckerling 2016: Part 2," *Wealth Management* (Feb. 10, 2016)
- "A View from the Audience at Heckerling (2016): Part I," *Wealth Management* (Feb. 5, 2016)
- "A View from the Audience at Heckerling: Part V," *Wealth Management* (Mar. 18, 2015)
- "A View from the Audience at Heckerling: Part IV," *Wealth Management* (Mar. 3, 2015)
- "A View from the Audience at Heckerling: Part III," *Wealth Management* (Feb. 26, 2015)
- "A View from the Audience at Heckerling: Part II," *Wealth Management* (Feb. 23, 2015)
- "A View from the Audience at Heckerling: Part I," *Wealth Management* (Feb. 18, 2015)
- "To Live and Die in New York," *Wealth Management* (Apr. 11, 2014)
- "Change on the Horizon for 2015?" *Wealth Management* (Feb. 14, 2014)
- "The Estate Planning World Has Been Turned Upside Down By ATRA," *Wealth Management* (Feb. 12, 2014)
- "The Obama Administration's Fiscal Year 2014 Tax Proposals That Pertain to Estate Planning," *TaxStringer* (May 2013)
- "A View from the Audience at Heckerling (2013)," *Wealth Management* (Feb. 15, 2013)
- "So What Does It Mean To Have a 'Permanent' Estate and Gift Tax System Anyway? – Estate Planning in 2013 and Beyond," *TaxStringer* (Feb. 2013)
- "Estate Planning Opportunities During 2012 Before the Clock Strikes 2013 – Use It or Lose It?" *TaxStringer* (May 2012)
- "A View from the Audience," *Wealth Management* (Feb. 3, 2011)
- "Successor Trustee Liability," *Wealth Management* (Mar. 1, 2010)
- "Play Ball! Estate Planning for Professional Athletes," *Wealth Management* (Aug. 12, 2009)
- "Play Ball!" *Wealth Management* (Jun. 1, 2009)
- "Practitioners Weigh In On 2 Percent Floor Debate," *Wealth Management* (Jul. 1, 2008)
- "Knight's Decided. Now What?" *Wealth Management* (Mar. 1, 2008)

Presentations

- "Estate Planning with Qualified Opportunity Zone (QOZ) Fund Interests," 2026 ACTEC Mid-Atlantic Regional Meeting, Maryland (Sept. 26, 2026)
- "Qualified Opportunity Zones and Estate Planning After OBBBA," Strafford, Webinar (Jul. 30, 2026)
- "Hot Topics in Estate Planning," NYU Summer Tax Institute Advanced Trusts and Estates Conference, New York (Jul. 24, 2026)
- "Estate and Gift Planning with the International Client," NYCPA 2026 Annual Estate Planning Conference, New York (May 21, 2026)
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"Heckerling Review with Kevin Matz, Esq.," Estate Planning Council of New York City, Inc., Conference, New York (Feb. 24, 2026)

- "Qualified Opportunity Zone Fund Planning in 2026 in Light of the OBBBA," 2026 ACTEC Annual Meeting, Tampa, Florida (Mar. 4, 2026)
- "Highlights of Heckerling," Wealthmanagement.com, Webinar (Feb. 11, 2026)
- "Planning with Qualified Opportunity Zone (QOZ) Funds Under the New Tax Law," 2025 NYSSCPA Private Wealth Conference, New York (Dec. 11, 2025)
- "Recent Developments Affecting Estate Planning," 2025 NYSSCPA Private Wealth Conference, New York (Dec. 11, 2025)
- "Estate and Gift Tax Update," NYSSCPA Queens-Brooklyn Tax Conference, Brooklyn (Nov. 10, 2025)
- "Agree to Not Agree with Buy-Sell Agreements After Connelly," Notre Dame Tax & Estate Planning Institute, Conference (Nov. 6, 2025)
- "Estate Planning Under the One Big Beautiful Bill Act (OBBBA) Part 2: Qualified Opportunity Zone (QOZ) Planning Strategies Post OBBBA," ACTEC, Podcast (Sept. 2025)
- "An Estate Planner's Guide to the One Big Beautiful Bill Act," ACTEC ALI-CLE, Webinar (Aug. 1, 2025)
- "Hot Topics in Estate and Gift Taxation," New York City Bar Association Tax Conference 2025, New York (Jun. 12, 2025)
- "Estate and Gift Planning with the International Client," New York City Bar Association Tax Conference 2025, New York (Jun. 12, 2025)
- "Mid-Year Developments in Estate Planning," Wealthmanagement.com, Webinar (Jun. 10, 2025)
- "Estate Planning and Carried Interest: Estate Tax Reduction Strategies for Private Equity and Hedge Fund Sponsors," Strafford, Webinar (Jun. 5, 2025)
- "Highlights of Heckerling," Wealthmanagement.com, Webinar (Feb. 6, 2025)
- "Recent Developments Affecting Estate Planning," NYSSCPA 2024 Annual Private Wealth Conference, New York (Dec. 12, 2024)
- "Estate Planning for Private Investment Fund Managers," NYSSCPA 2024 Annual Estate Planning Conference, Webinar (May 23, 2024)
- **"**Highlights of the 2024 Heckerling Institute on Estate Planning Tech Session Webinar," NYSSCPA, Webinar (Feb. 16, 2024)
- "Estate Planning and Carried Interest: Estate Tax Reduction Strategies for Private Equity and Hedge Fund Sponsors, Strategies for Wealth Transfer and Asset Protection to Avoid Adverse Tax Consequences," Strafford, Webinar (Feb. 15, 2024)
- "Highlights of Heckerling," Wealthmanagement.com, Webinar (Jan. 31, 2024)
- "A Magical Mystery Tour Through the Chapter 14 Labyrinth - Practical Issues and Applications," 58th Annual Heckerling Institute on Estate Planning, University of Miami School of Law, Conference (Jan. 11, 2024)
- "The Opportunity Zones Transparency, Extension, and Improvement Act," The American College of Trust and Estate Counsel Foundation, Podcast (Jan. 2, 2024)
- "Recent IRS Challenges to Grantor Retained Annuity Trusts (GRATs)," Estate Planning Council of Northern New Jersey, Webinar (Oct. 18, 2023)
- "FLPs and FLLCs: Soup to Nuts and the Current State," American Law Institute Continuing Legal Education, Webinar (Oct. 6, 2023)
- "Recent Developments in Estate Planning," New York State Society of CPAs, Conference (May 18, 2023)
- **"**Estate Planning for Private Equity and Hedge Fund Managers," Foundation for Accounting Education, Webinar (Feb. 2, 2023)
- "Highlights of Heckerling," Trusts and Estates Magazine/WealthManagement.com, Webinar (Feb. 1, 2023)
-

"Estate Planning with Grantor Trusts," NYSSCPA 2022 Annual Private Wealth Conference, New York (Dec. 7, 2022)

- "Qualified Opportunity Zone Funds from A to OZ – A Primer on the Tax Rules that apply to QOZ Funds," Notre Dame® Tax & Estate Institute, Webinar (Nov. 9, 2022)
- "Recent Developments," NYSSCPA 2022 Annual Estate Planning Conference, Webinar (May 17, 2022)
- "Estate Planning for Qualified Opportunity Zone Fund Investments," Strafford, Webinar (Apr. 21, 2022)
- "Estate Planning for High Net Worth Individuals in 2022," Estate Planning Council of Westchester, Webinar (Feb. 23, 2022)
- "Gifting and Planning: Estate Planning for High Net Worth Individuals in 2022," NYSBA 2022 Annual Conference, Virtual (Jan. 26, 2022)
- "Estate Planning with Specialty Assets: Carried Interests, SPAC, and QOZ Funds," ACTEC and ALI-CLE, Webinar (Jan. 20, 2022)
- "Qualified Opportunity Zones from A to OZ," NYSSCPA/FAE Trust and Estate Conference, Webinar (Dec. 8, 2021)
- "Qualified Opportunity Funds and Opportunity Zones," Federal Tax Day Program, Webinar (Nov. 2, 2021)
- "Recent Developments Panel," and "Practical Estate Planning Strategies in a Time of Legislative Uncertainty," NYSSCPA Estate Planning Conference, Webinar (Oct. 28, 2021)
- "Estate Planning and Carried Interest: Estate Tax Reduction Strategies for Private Equity and Hedge Fund Founders," Strafford, Webinar (Sep. 9, 2021)
- "SPACs and Estate Planning: Transfer Planning for SPAC Assets, Income and Gift Tax Planning, Pitfalls to Avoid," Strafford Live, Webinar (Aug. 31, 2021)
- "Highlights of 2021 Heckerling Institute on Estate Planning, " New York State Society of CPAs (May 20, 2021)
- "Change in Control of Congress May Signal Seismic Shift in Future Estate Planning Opportunities," (moderator) Stroock (Mar. 22, 2021)
- "Qualified Opportunity Funds, Opportunity Zones and ESG Investing Conference," (panelist) NYSSCPA (Sep. 17, 2020)
- "Estate Planning Considerations in the Current Environment," NYSSCPA (Apr. 7, 2020)
- "Highlights of 2020 Heckerling Institute on Estate Planning Tech Session," UJA-Federation of New York (Mar. 12, 2020)
- "Opportunity Is Knocking: Frozen O-Zone Planning with Qualified Opportunity Funds," 54th Annual Heckerling Institute on Estate Planning, Orlando, Fla. (Jan. 15, 2020)
- Ernst and Young's Private Client Advisor Roundtable, New York, N.Y. (Dec. 17, 2019)
- "Qualified Opportunity Zones," Westchester/Rockland Chapters Tax Conference-Part 2, Rye Brook, N.Y. (Dec. 2, 2019)
- "Family Office Structures and Wealth Management and Preservation" and "Tax Issues Affecting Family Offices," (moderator) Stroock's Second Annual Family Office Symposium, New York, N.Y. (Nov. 13, 2019)
- "Boundless Impact Investigating," Webinar (Oct. 8, 2019)
- "Opportunity Zones/Provisions of the Recent Tax Law," Dallas Estate Planning Council, Dallas, Texas (Oct. 3, 2019)
- "Latest Developments and Planning Ideas in Changing Times," 2019 Trust Symposium, New York, N.Y. (Sep. 25, 2019)
- "Estate Planning and Carried Interest: Estate Tax Reduction Strategies for Private Equity and Hedge Fund Founders," Webinar, Strafford (Sep. 4, 2019)
- Summary of the U.S. Department of Treasury's July 9 Public Hearing, NYSSCPA, New York, N.Y. (Aug. 13, 2019)
-

2019 Opportunity Zone Expo, New York, N.Y. (Aug. 9, 2019)

- "Making Money With Opportunity Zones and Tax the Benefits," Opal Family Office & Private Wealth Management Forum, Newport, R.I. (Jul. 23, 2019)
- "Qualified Opportunity Funds and Opportunity Zones," 2019 NYU Summer Tax Institute's Advanced Trusts and Estates Conference, New York, N.Y. (Jul. 18, 2019)
- 1st Annual Qualified Opportunity Funds and Opportunity Zones Symposium, NYSSCPA, New York, N.Y. (Jun. 19, 2019)
- "Qualified Opportunity Funds and Opportunity Zones: What Estate Planners Need to Know," American College of Trust and Estate Counsel Webcast (May 30, 2019)
- Annual Estate Planning Conference, NYSSCPA, New York, N.Y. (May 23, 2019)
- The American College of Trust and Estate Counsel's 2019 Annual Meeting, La Quinta, Calif. (Mar. 20-24, 2019)
- Highlights of 2019 Heckerling Institute on Estate Planning, New York, N.Y. (Mar. 7, 2019)
- "Section 199A: Final Regulations, New Guidance, and Implications for Estate Planners," Webinar, American College of Trust and Estate Counsel (Feb. 20, 2019)
- Estate Planning Committee Meeting, NYSSCPA, New York, N.Y. (Feb. 13, 2019)
- "Qualified Opportunity Zone Funds," Partnerships and LLCs Taxation Conference, NYSSCPA, New York, N.Y. (Jan. 23, 2019)
- Trust and Estate Taxation Conference, NYSSCPA, New York, N.Y. (Dec. 4, 2018)
- Queens/Brooklyn Chapter Annual Tax Conference, NYSSCPA, Brooklyn, N.Y. (Dec. 4, 2018)
- "Overview of Opportunity Zones and the Latest Guidance from the Treasury & IRS," (moderator) The Riverside Experience Opportunity Zone Conference, New York, N.Y. (Nov. 29, 2018)
- "Qualified Opportunity Zones: Pros and Pitfalls," New York, N.Y. (Nov. 15, 2018)
- "The Future of Estate Planning and the Impact of the Tax Reform," New York, N.Y. (Nov. 14, 2018)
- "Top Ten Estate Planning Techniques After the 2017 Tax Act," New York City Bar, New York, N.Y. (Nov. 14, 2018)
- "Qualified Opportunity Funds" (panelist) Stroock Family Office Symposium, New York, N.Y (Nov. 8, 2018)
- Tax Planning for Individuals Conference, Foundation for Accounting Education, New York, N.Y. (Nov. 5, 2018)
- "The Lender Management Case and Qualified Opportunity Funds," New York Tax Study Group Meeting, New York, N.Y. (Oct. 25, 2018)
- "Tax Planning Under the Tax Cuts and Jobs Act of 2017," New York City Bar Association, New York, N.Y. (Oct. 18, 2018)
- "The Proposed Section 199A Regulations and Multiple Trust Rules: What Estate Planners Need to Know," Webinar, The American College of Trust and Estate Counsel (Oct. 17, 2018)
- 2018 Trust Symposium, Wilmington Trust, New York, N.Y. (Oct. 2, 2018)
- "Estate Planning and Carried Interest: Estate Tax Reduction Strategies for Private Equity and Hedge Fund Founders," Webinar, Strafford (Sep. 5, 2018)
- Trust and Estates Tax Conference, NYU School of Professional Studies, New York, N.Y. (Jul. 19-20, 2018)
- Estate Planning Conference, NYSSCPA, New York, N.Y. (May 24, 2018)
- "Highlights of 2018 Heckerling Institute on Estate Planning," Foundation for Accounting Education, New York, N.Y. (Mar. 1, 2018)
- "A Brave New World in Estate Planning," New York State Bar Association, New York, N.Y. (Jan. 24, 2018)
- Trust and Estate Taxation Conference, Foundation for Accounting Education, New York, N.Y. (Dec. 7, 2017)
-

"Estate Planning Strategies: The Top Ten List," Webinar, New York City Bar Association (Nov. 29, 2017)

- Estate Planning Committee Meeting, NYSSCPA, New York, N.Y. (Nov. 16, 2017)
- "A Case Study in Celebrity Estates," NYSSCPA, New York, N.Y. (Sep. 28, 2017)
- "U.S. Estate and Gift Taxation of Nonresident Aliens," NYSSCPA, New York, N.Y. (Aug. 22, 2017)
- "Estate Planning and Carried Interest: Estate Tax Reduction Strategies for Private Equity and Hedge Fund Founders," Webinar, Stafford (Aug. 1, 2017)
- Estate Planning Conference, NYSSCPA, New York, N.Y. (May 25, 2017)
- Yale Club Insurance Group, New York, N.Y. (Apr. 3, 2017)
- 2017 Heckerling Review, NYSSCPA, New York, N.Y. (Feb. 16, 2017)

Recognitions

- The Best Lawyers in America, *Best Lawyers* (2020-2027)
- *Chambers High Net Worth* – Private Wealth Law, New York (2020-2026); Private Wealth Law: Eastern Region, USA (2023-2026)
- 2026 Best-In-State CPAs, *Forbes*, New York
- *New York Metro Super Lawyers*, Thomson Reuters (2021)
- Top 25 Opportunity Zone Influencers, *Opportunity Zone Magazine* (2019-2021)

Boards, Memberships & Certifications

- American College of Trust and Estate Counsel (ACTEC), Fellow, Program Committee (2023)
- UJA Federation of New York, Trusts and Estates Lawyers Group, Chair (2019-Present)
- Foundation for Accounting Education (FAE), NYSSCPA, Trustee (2015-Present)
- Foundation for Accounting Education (FAE), NYSSCPA, President of Board of Trustees (2018-2019)
- Foundation for Accounting Education (FAE), NYSSPCA, Curriculum Committee, Chair (2016–Present)
- Certified Public Accountant (CPA)

Previous Work

- Hon. Joanna Seybert, U.S. District Court for the Eastern District of New York, Law Clerk
- Hon. John M. Cannella, U.S. District Court for the Southern District of New York, Law Clerk

Bar Admissions

New York
New Jersey