Joshua S. Rubenstein

Partner

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Practices

FOCUS: Private Wealth

Business Succession Planning

Charitable Planning, Philanthropy and Nonprofit Organizations

Fiduciary and Private Client Litigation

International

International Estate Planning

Industries

Family Offices

Private Client Services

Education

JD, Columbia Law School, *Harlan Fiske Stone Scholar*

BA, Columbia University, *magna cum laude, Phi Beta Kappa*

Bar Admissions

New Jersey

New York

Court Admissions

US District Court, District of New Jersey

US District Court, Eastern District of New York

US District Court, Southern District of New York

US Tax Court

Community Involvements

American Law Institute, Estate Planning Advisory Board

Central Park Conservancy, Advisory Council

Chess in Schools

In his widely respected practice, Joshua Rubenstein, national chair of the firm's Private Wealth practice, brings a variety of important services under one roof for high-net-worth individuals. He offers integrated planning, administration and litigation counseling for individuals, their estates and their businesses, all of it designed to preserve wealth over generations. His advice stretches as far as his clients' financial interests – locally, nationally and globally.

All-encompassing counsel for private clients

Josh is the rare trusts and estates attorney that does not focus exclusively on either planning, estate administration, or litigation. Instead, he integrates all three. The result, for clients, is deeper insight in each area that may affect them. Josh performs his planning and administration with a view to minimizing litigation risk; meanwhile, he litigates cases with a view towards discovering planning opportunities. Appreciating his insights and the strong qualities he has as an attorney, clients express how "Josh leads the department, and he is the person I would send clients to for complex work. He has all the qualities you need for a great lawyer: he has good judgement, he is hardworking [and] he is constantly available" (*Chambers HNW*).

In any craft, making it "look easy" only happens with considerable experience and talent. Josh, who has been practicing in the field for more than 35 years, has a unique ability to create sophisticated solutions that are also elegant and uncomplicated. Clients praise his intelligence and experience, describing him as "…one of the best. He's extremely smart and has tremendous experience and expertise in trust and estate cases. He is very strong but calm, straightforward and will outfox the other side" (*Chambers HNW* 2018). In the area of estate administration, which can bring intense feelings to the surface for family members, Josh and his clients also benefit from his emotional intelligence. Representing the executor of a multibillion-dollar estate who was being sued by siblings over their treatment in their parents'

City of Hope

American College of Trust and Estate Counsel, International Estate Planning Committee Chair, International Membership Committee Chair, State Laws Committee Past Regent and Past Chair

American College of Trust and Estate Counsel Foundation, Director

Columbia Law School, Trusts, Wills and Estate Planning Advisory Council

Columbia University, Planned Giving Advisory Committee

Columbia University Health Sciences Center, Advisory Council

Fiduciary Accounting and Trust Administration Guide, Attorney Advisory Board

Fiduciary Trust International, Trust Advisory Board

Hadassah Estate Planning Seminar, Faculty and Advisory Board

International Bar Association, Family Law Section Officer

International Bar Association, Family Law Committee, International Liaison Officer

International Wealth Advisors Forum, Steering Committee

Irvington Institute for Immunological Research, Past President

Jewish Board of Family and Children's Services, Past Vice President

Legal Week, Conference Advisory Board

Lincoln Center for the Performing Arts, Professional Advisors Council

Matthew Bender, Editorial Board

Merrill Lynch, Attorney Advisory Board

Metropolitan Museum of Art, Professional Advisors Council

Museum of Art and Design, Professional Advisory Committee

Museum of Modern Art, Professional Advisors Council

New Jersey Bar Association

New York City Ballet, Professional Advisory Committee

Association of the Bar of the City of New York

will, Josh crafted a solution that satisfied all parties and restored family harmony. In that instance, and others, Josh has kept what would have been a high-profile dispute out of the news. Instead, it remained a private affair.

Recognitions

- American College of Trust and Estate Counsel
  - Fellow
- AV Preeminent Peer Review Rating by LexisNexis Martindale-Hubbell
- *Best Lawyers in America*
  - Trusts and Estates, 1993–2020
- *Chambers High Net Worth*
  - Leading Individual, 2017–2018
- *Chambers Global*
  - International Private Client
    - Global-wide, 2012–2020
- *Chambers USA*
  - Leading Individual, 2006–2016
- *Citywealth*
  - Editor's Choice Award, 2011
  - International Lawyer of the Year, 2012
  - Leaderslist, 2011, 2015–2016
  - Top 20 Leading Lawyers, 2006–2010
  - Top 20 Men in Private Wealth Management, 2008, 2020
- *Crain's New York Business*
  - Most-Connected New Yorkers, 2014

Joshua S. Rubenstein

Partner

New York Office of Court Administration Advisory, Committee on Surrogate's Courts

New York Philharmonic, Advisory Council

New York Public Library, Professional Advisory Committee

New York State Bar Association, Trusts and Estates Law Section Past Chair

No Name Discussion Group

Practising Law Institute, Estate Advisory Committee

Society of Trust and Estate Practitioners (STEP), Panel of Experts for Private Client Awards

The International Academy of Estate and Trust Law (IAETL), Academician; Treasurer, Executive Council, Regional Committee for the United States

UJA Federation, Trust & Estates Division Past Chair

Warren's Heaton, Editorial Board

American Bar Association, Real Property, Trust and Estate Law and Taxation Sections, International Estate Planning Committee Past Chair

- Estate Planning Hall of Fame
  - 2017
- Lawdragon
  - 500 finalist, 2010
- Legal Week
  - Private Client Global Elite, 2017–2019
- *National Law Journal*
  - Divorce, Trusts & Estates Trailblazer, 2016
- New York Bar Foundation
  - Fellow
- *New York Law Journal*
  - Distinguished Leader, 2019
- *New York Magazine*
  - Legal Leaders, Top Rated Trusts & Estates Lawyers, 2020
- Step Private Client Awards
  - Advocate of the Year
    - Finalist, 2019
- Super Lawyers
  - New York, 2006–2019
- *The American Lawyer*
  - Transatlantic Lawyer of the Year
    - Private Client, 2016
- *The International Who's Who of Private Client Lawyers*
  - Top Ten Most Highly Regarded Individual, 2013

Joshua S. Rubenstein

Partner

"'His work product is amazing,' said a peer; 'he gives the full range of advice on estate planning and international planning. His knowledge base is much more practical - he can see things from a client's perspective.'"

- Chambers Global 2019 (Global, International Private Client) survey response

News

- *Chambers Global* Ranks Katten in Derivatives and Securitisation (February 13, 2020)
- Joshua Rubenstein Recognized as Elite NY Wealth Management Professional by *Citywealth Leadership* (January 23, 2020)
- Joshua Rubenstein Talks Future of Wealth Management with *Citywealth Magazine* (January 16, 2020)
- *New York Law Journal* recognizes Joshua Rubenstein as "Distinguished Leader" (October 24, 2019)
- Joshua Rubenstein talks to *Barron's* about the future healthcare needs of beneficiaries in trusts (October 1, 2019)
- Katten Attorneys Nominated to 2019 New York Super Lawyers, Rising Stars Lists (September 12, 2019)
- Joshua Rubenstein comments in *Fox Business* on deceased financier and sex offender Jeffrey Epstein's will (August 26, 2019)
- Josh Rubenstein talks to *The Tribune News Service* about the financial challenges of getting married later in life (August 23, 2019)
- Joshua Rubenstein interviewed by Global Elite as "mover and shaker" in Private Client field (July 18, 2019)
- *Chambers High Net Worth* Guide Recognizes Katten's Private Wealth Practice (July 12, 2019)
- *Citywealth* Names Katten International and US Law Firm of the Year (May 20, 2019)
- Katten's Nationally Recognized Private Wealth Practice Grows with New Partner in Chicago (May 13, 2019)
- *Chambers Global* Praises Katten Attorneys in Financial Services, Trusts & Estates (February 21, 2019)

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- Katten Welcomes Leading International Private Client Partner Matthew Sperry (February 19, 2019)
- Katten Recognized as Law Firm of the Year in Trusts & Estates Law (November 1, 2018)
- Katten Lands New Private Wealth Partner in Chicago (September 18, 2018)
- Katten Attorneys Named to 2018 New York *Super Lawyers*, Rising Stars Lists (September 13, 2018)
- Katten's "Top-Notch" Private Wealth Practice Praised in *Chambers High Net Worth* Guide (August 6, 2018)
- Katten Expands California Private Wealth Practice (June 4, 2018)
- Katten Attorneys Lauded by *Chambers Global* 2018 (February 21, 2018)
- Joshua Rubenstein Quoted Regarding Complex Foreign and Domestic Community Property Issues (January 26, 2018)
- Joshua Rubenstein Elected to the NAEPC Estate Planning Hall of Fame (November 17, 2017)
- Katten Attorneys Acknowledged in 2017 New York Super Lawyers, Rising Stars Lists (September 20, 2017)
- Katten Private Wealth Practice Hailed in *Chambers High Net Worth* Guide for Top Talent and Cross-Border Excellence (September 15, 2017)
- Kathryn von Matthiessen Rejoins Katten as Private Wealth Partner (August 10, 2017)
- Joshua Rubenstein Quoted on the Continued Impact of the Panama Papers (April 20, 2017)
- Katten Ranked by *Chambers Global* 2017 (March 16, 2017)
- Joshua Rubenstein Provides Legal Trends Insight in the Advent of the Trump Administration (February 2, 2017)
- Joshua Rubenstein Quoted in *The American Lawyer* on the Wait for Trump's Estate Tax Plan (December 21, 2016)

- Joshua Rubenstein Provides Insight on Brexit's Impact on Latin American Wealth Management (September 22, 2016)
- Eighteen Katten Attorneys Distinguished in 2016 New York Metro *Super Lawyers* List (September 21, 2016)
- 79 Katten Attorneys Selected for *Best Lawyers in America*® 2017 (August 15, 2016)
- Joshua Rubenstein Quoted in the *New York Times*, *Reuters*, *Artforum International Magazine* and Artnet on Gagosian Gallery Sales Tax Settlement (July 21, 2016)
- Katten Private Wealth Practice Lauded in Inaugural *Chambers High Net Worth* 2016 Guide (June 24, 2016)
- Joshua Rubenstein Comments on Sports and Ultra-High-Net-Worth Individuals (June 9, 2016)
- *Chambers USA* 2016 Distinguishes 22 Katten Practices and 50 Attorneys (May 27, 2016)
- Joshua Rubenstein Featured in *The American Lawyer* on High-End Estate Planning (May 23, 2016)
- Joshua Rubenstein Quoted on Prince's Estate and Music (May 2, 2016)
- Joshua Rubenstein Comments on Prince's Lack of a Will (April 29, 2016)
- Six Katten Partners Recognized by *Chambers Global* (March 17, 2016)
- Joshua Rubenstein Featured in Q&A Regarding How Political Affairs Affect the Economy (March 16, 2016)
- Joshua Rubenstein Named Divorce, Trusts & Estates Trailblazer by *The National Law Journal* (March 2016)
- Joshua Rubenstein Quoted on Estate Issues for Same-Sex Couples (February 16, 2016)
- Joshua Rubenstein Comments on Growing Trend in Family Estate Conflicts (January 20, 2016)
- Joshua Rubenstein Quoted in *The Washington Post* on David Bowie's Estate (January 18, 2016)

- Joshua Rubenstein Comments on the State of the Private Client Industry (January 14, 2016)
- Joshua Rubenstein Comments on David Bowie's Postmortem Record Sales in the *San Jose Mercury News* (January 11, 2016)
- Joshua Rubenstein's Testimony in Off-Shore Trusts Case Reported in *The Dallas Morning News* and Law360 (January 7, 2016)
- Joshua Rubenstein Comments in *Forbes* Article on Earning Power of Dead Celebrities (October 30, 2015)
- Twenty Katten Attorneys Recognized in 2015 New York Metro *Super Lawyers* List (September 16, 2015)
- 91 Katten Attorneys Recognized in *Best Lawyers in America*® 2016 (August 17, 2015)
- Joshua Rubenstein Featured in Q&A on Sales in the Art Market (June 5, 2015)
- Katten Attains 22 Practice and 58 Attorney Rankings by *Chambers USA* 2015 (May 20, 2015)
- Joshua Rubenstein Quoted in *Morningstar* Article on Effective Estate Planning (May 6, 2015)
- Joshua Rubenstein Featured in *Legal Week* Discussion on the Importance of Capacity in Succession Planning (April 24, 2015)
- Joshua Rubenstein Quoted in *Bloomberg* Article on Success of Trusts and Estates Lawyers (March 23, 2015)
- Joshua Rubenstein Featured in *Citywealth Weekly* Article on UK Elections' Impact on US Clients (March 19, 2015)
- Six Katten Partners Praised by *Chambers Global* (March 13, 2015)
- Joshua Rubenstein's Role in Private Client Forum Americas Event Featured in *Bernews* Article (February 26, 2015)
- Eighteen Katten Attorneys Named to 2014 New York Metro *Super Lawyers* List (September 23, 2014)

- 85 Katten Attorneys Named to *Best Lawyers in America*® 2015 (August 18, 2014)
- Josh Rubenstein, Head of the Private Wealth Practice, Named One of "Most-Connected New Yorkers" by *Crain's New York Business* (June 25, 2014)
- *Chambers USA* 2014 Distinguishes 24 Katten Practices and 54 Attorneys (May 23, 2014)
- Six Katten Partners Lauded by *Chambers Global* (March 14, 2014)
- Partner Josh Rubenstein Recognized as a Most Highly Regarded Individual by *The International Who's Who of Private Client Lawyers* (October 17, 2013)
- Seventeen Katten Attorneys Named to 2013 New York Metro *Super Lawyers* List (September 18, 2013)
- Partner Josh Rubenstein Comments on Inheritance Rights of Posthumously Conceived Children in *The New York Times* (September 3, 2013)
- 83 Katten Attorneys Lauded in *Best Lawyers in America*® 2014 (August 15, 2013)
- Partner Joshua Rubenstein Comments on DOMA Ruling in *Stamford Advocate* (July 2, 2013)
- Partner Joshua Rubenstein Quoted in *The American Lawyer* on Increase in Trusts and Estates Work (July 2, 2013)
- *Chambers USA* 2013 Recognizes 24 Katten Practices and 49 Attorneys (May 24, 2013)
- Partner Joshua Rubenstein's Remarks at International Trusts Conference Featured in *Jersey Evening Post* (April 29, 2013)
- Partner Joshua Rubenstein Discusses Trusts and Estates Work with *The Am Law Daily* (March 20, 2013)
- Five Katten Partners Recognized by *Chambers Global* (March 18, 2013)
- 80 Katten Attorneys Named to *Best Lawyers in America*® 2013 Guide (August 24, 2012)

- *Chambers USA* 2012 Distinguishes 19 Katten Practices and 45 Attorneys (June 7, 2012)
- Katten Named International Law Firm of the Year by *Citywealth* (May 14, 2012)
- Six Katten Partners Lauded by *Chambers Global* 2012 (April 26, 2012)
- 75 Katten Attorneys Named to *Best Lawyers in America®* 2012 Guide (September 12, 2011)
- Partner Joshua Rubenstein Quoted in *Forbes* Blog on Avoiding State Death Taxes (July 13, 2011)
- Katten Earns Recognition for 17 Practices and 44 Attorneys in 2011 *Chambers USA* Guide (June 10, 2011)
- Partner Joshua Rubenstein Quoted in *Wall Street Journal* on 2010 Estate Tax Twist (June 5, 2011)
- Partner Joshua Rubenstein Receives *Citywealth* Editor's Choice Award (May 2011)
- Partner Joshua Rubenstein Quoted in *Financial Post* on Estate Taxes by State (March 22, 2011)
- Partners Joshua Rubenstein, Michael Hartz Named to *Citywealth* Leaders List (January 2011)
- Partner Joshua Rubenstein Quoted in *Wall Street Journal* on New Tax Laws (January 3, 2011)
- Partner Joshua Rubenstein Quoted in *Forbes* Blog on Changes to Estate Tax (December 7, 2010)
- Partner Joshua Rubenstein Quoted in *Wall Street Journal* on Year-End Estate Planning (November 20, 2010)
- Partner Joshua Rubenstein Interviewed on New Hampshire Public Radio on Rights of Frozen Embryos (November 9, 2010)
- Partner Joshua Rubenstein Authors Article in *Trusts & Estates* on Congress and Estate Tax (November 9, 2010)

- Partner Joshua Rubenstein Quoted in *InvestmentNews, Forbes* on Federal Estate Tax in 2010 (October 30, 2010)
- Katten's Private Wealth Practice Named North American Private Client Team of the Year at 2010-2011 STEP Private Client Awards (October 25, 2010)
- Partner Joshua Rubenstein Quoted in *Bloomberg BusinessWeek*, Forbes.com on Strange Conclusion to Year Without Estate Tax (October 2010)
- Partner Joshua Rubenstein Quoted in *Wall Street Journal* on Power of Attorney (October 3, 2010)
- Partner Joshua Rubenstein Quoted in Private Asset Management on the Future of the Federal Estate Tax (September 29, 2010)
- Partner Joshua Rubenstein Quoted in *New York Times* on Estate Tax Strategies (September 15, 2010)
- Partner Joshua Rubenstein Interviewed in *Trusts & Estates* on 2010 Estate Plans (August 2010)
- 70 Katten Attorneys Named to *Best Lawyers in America®* 2011 (August 9, 2010)
- Partner Joshua Rubenstein Authors Article in *Trusts & Estates* on Estate Planning for Unmarried Partners (July 2010)
- Katten's Private Wealth Practice Shortlisted for 2010 STEP Private Client Awards (July 27, 2010)
- Partner Joshua Rubenstein Quoted in *Wall Street Journal* on Federal Estate Tax (July 19, 2010)
- Partner Joshua Rubenstein Quoted in *Forbes* on Preparing for Estate Tax (June 2010)
- Katten Lands 16 Practices and 39 Attorneys in *Chambers USA* Guide (June 24, 2010)
- 12 Katten Partners Named Among Nation’s Leading Lawyers by Lawdragon (May 19, 2010)

- Partner Joshua Rubenstein Authors Article in *NYSBA Journal* on Legislative Changes (March/April 2010)
- Partner Joshua Rubenstein, Private Wealth Practice Recognized by Practical Law Company (April 2010)
- Partner Joshua Rubenstein Quoted in *Wall Street Journal* on Life Insurance for the Wealthy (April 3, 2010)
- Katten Nominated for “International Law Firm of the Year” by *Citywealth* (April 2, 2010)
- Partner Joshua Rubenstein Authors Article in *Estate Planning* on Posthumous Control Over Remains (March 2010)
- Partner Joshua Rubenstein Quoted in *New York Times* on Disclaiming Inheritance (February 17, 2010)
- Partner Josh Rubenstein Authors Article in *Citywealth* on Expiration of Federal Estate Tax (January 2010)
- Partner Joshua Rubenstein Authors Article on Charitable Donations to Haiti (January 27, 2010)
- Partner Joshua Rubenstein Appears in Media Discussing Estate Tax (January 2010)
- Katten’s Joshua S. Rubenstein Named Among Top Wealth Management Advisors in the World for Fifth Consecutive Year (December 17, 2009)
- Partner Joshua Rubenstein Authors Book Chapter on Trusts (November 25, 2009)
- 66 Katten Attorneys Named to 2010 List of *Best Lawyers in America®* (August 5, 2009)
- Partner Joshua Rubenstein Earns Recognition from *Chambers USA* (July 2009)
- Katten Lands 14 Practices and 37 Attorneys in *Chambers USA* Guide (June 12, 2009)
- Katten's Joshua Rubenstein Named Among Top Wealth Management Advisors in the World for Fourth Consecutive Year (March 18, 2009)

- Partner Joshua Rubenstein Quoted in *New York Times* on Shift in Estate Laws (February 26, 2009)
- Katten's Joshua Rubenstein Named to *Worth* Magazine's Top 100 Attorneys List for Fourth Consecutive Year (December 9, 2008)
- Partner Joshua Rubenstein Quoted in *Wall Street Journal* on Obama's Tax Plan (November 4, 2008)
- 50 Katten Attorneys Named to 2009 List of *Best Lawyers in America®* (September 23, 2008)
- Katten's National Private Wealth Practice Named as Finalist for 2008-09 STEP Private Client Awards (July 10, 2008)
- Katten Lands 14 Practices and 32 Attorneys in *Chambers USA* Guide (June 13, 2008)
- Katten's Joshua Rubenstein Named One of World's Top Private Wealth Management Advisors by *Citywealth* (April 16, 2008)
- *Worth* Magazine Names Two Katten Attorneys to Top 100 Attorneys List (November 13, 2007)
- 46 Katten Attorneys Named to 2008 List of *Best Lawyers in America®* (October 31, 2007)
- Katten's National Private Wealth Practice Named Finalist for STEP Private Client Awards (September 5, 2007)
- Partner Joshua Rubenstein Quoted in *Wall Street Journal* Law Blog Article on Post-Nuptial Agreements (June 20, 2007)
- Katten Lands 15 Practices and 28 Attorneys in *Chambers USA* Guide (June 15, 2007)
- Katten's Joshua Rubenstein Named One of World's Top Wealth Advisors (April 2, 2007)
- 13 Katten Partners Named Among Top 3,000 Attorneys in America by Lawdragon (September 15, 2006)
- Beth Tractenberg Joins Katten as Partner in Private Wealth Practice (July 25, 2006)

- Katten Lands 12 Practices and 24 Attorneys in *Chambers USA* Guide (June 7, 2006)
- Joshua S. Rubenstein Elected Treasurer of International Academy of Estate and Trust Law (June 5, 2006)
- *Citywealth* Names Three Katten Partners to List of Top 100 Wealth Advisors in North America (May 19, 2006)
- Joshua Rubenstein Named One of World's Top 100 Wealth Advisers by *Citywealth* (April 26, 2006)

Publications

- Looking Beyond the COVID-19 Crisis (March 23, 2020)
- 2019 Year-End Private Wealth Advisory (November 25, 2019)
- Katten Team Publishes 2018 Year-End Estate Planning Series (December 4–7, 2018)
- 2018 Year-End Estate Planning Advisory (November 19, 2018)
- The Tax Cuts and Jobs Act: Gift, Estate and Generation-Skipping Transfer Tax Reform (February 28, 2018)
- Pre-Immigration Planning Considerations for the HNW Client: Think Before You Leap (January 3, 2018)
- Getting Out of Federal Court (December 18, 2017)
- 2017 New York Legislative Update Affecting Trusts & Estates Law (November 29, 2017)
- 2017 Year-End Estate Planning Advisory (November 20, 2017)
- Planning for Life After Death: Laws of Succession v the New Biology (January 9, 2017)
- 2016 Year-End Estate Planning Advisory (November 21, 2016)
- The US Connection: Planning for Global UHNW Families Who Have American Family Connections (September 7, 2016)

- Proposed Regulations Under Internal Revenue Code Section 2704: Changes May Be Coming to Transfers of Closely Held Business Interests (September 6, 2016)
- 2015 Year-End Estate Planning Advisory (November 23, 2015)
- Estate Planning Update for Same-Sex and Unmarried Couples (November 2015)
- The European Succession Regulation: Important New Estate Planning Risks and Opportunities for Americans Living, Investing or Owning Property in the European Union (October 20, 2015)
- The Surface Transportation and Veterans Health Care Choice Improvement Act of 2015: Important Changes Affecting Tax Filings for Individuals and for Trusts and Estates (August 20, 2015)
- Eight Key Estate Planning Opportunities Arising from the Supreme Court's Decision on Same-Sex Marriage (June 29, 2015)
- Pre-Immigration Planning Considerations for the HNW Client – Think Before You Leap (December 2014)
- 2014 Year-End Estate Planning Advisory (November 26, 2014)
- US Reporting Requirements: The Long Arm of US Tax Law (October 2014)
- Trusts and Estates Planning Opportunities Arising From Recent Changes to the New York Estate Tax and Trust Income Tax Regimes (April 9, 2014)
- The New York Non-Profit Revitalization Act of 2013 – Important Changes Affecting New York Nonprofit Entities and Charitable Trusts (February 24, 2014)
- 2013 Year-End Estate Planning Advisory (November 2013)
- Estate Planning Opportunities Arising from Recent Revenue Ruling Concerning Marriages of Same-Sex Couples (September 3, 2013)
- *Windsor*—The Practitioner's Viewpoint (July 19, 2013)

- Estate Planning Opportunities Arising from Recent Landmark Supreme Court Decisions Concerning Marriages of Same-Sex Couples (June 28, 2013)
- Estate Planning After the Fiscal Cliff Deal (January 16, 2013)
- 2012 Year-End Estate Planning Advisory (November 20, 2012)
- IRS Releases Guidance on Foreign Financial Asset Reporting (February 1, 2012)
- Offshore Voluntary Disclosure Program Reopens (January 11, 2012)
- 2011 Year-End Estate Planning Advisory (November 23, 2011)
- Extension and New Guidance for the Voluntary Disclosure Initiative for Undisclosed Foreign Assets (June 10, 2011)
- House Votes 277-148 to Approve Senate Tax Cut Extension Bill (December 17, 2010)
- 2010 Year-End Estate Planning Advisory (November 2010)
- Important Changes to New York Not-For-Profit Corporation Law (October 14, 2010)
- 2010 Estate Tax Planning Strategies—Once-in-a-Lifetime Opportunities vs. Potential Traps for the Unwary (September 21, 2010)
- 2010 Revisions to New York Power of Attorney Statute Take Effect September 12 (August 24, 2010)
- HIRE Act Affects Foreign Trusts and Imposes Additional Requirements on US Persons with Foreign Accounts (March 24, 2010)
- New FBAR Guidance and Proposed Regulations Issued (March 4, 2010)
- US Government Acts Quickly to Help Haiti with Tax Benefits for Donors (February 2, 2010)
- Hooray, There's No Estate Tax: Now What Do I Do? (January 7, 2010)
- Possible One-Year Elimination of Estate and Generation-Skipping Transfer Tax in 2010: Going, Going, Gone? (December 23, 2009)
- 2009 Year-End Estate Planning Advisory (December 2009)

- IRS Announces One-Time Extension for Voluntary Disclosure (September 21, 2009)
- IRS Extends FBAR Filing Date (August 12, 2009)
- Changes to New York Powers of Attorney Effective September 1 (July 28, 2009)
- Update: Josh Rubenstein, Katten Muchin Rosenman on Latin America (July 2009)
- IRS Temporarily Relaxes FBAR Filing Requirements for Non-US Persons (June 10, 2009)
- "FBAR" Filings Disclosing Foreign Accounts Due June 30 (May 12, 2009)
- Estate Planning for Unmarried Partners (2008)
- 2008 Year-End Estate Planning Advisory (December 2008)
- New Expatriation Legislation Passed Unanimously by Congress and Signed by President (June 2008)
- Opportunities: Cloud Over Economy Creates Estate Planning Silver Lining (February 2008)
- Standby Guardianship Legislation: At the Midway Point (July 10, 2007)
- Offshore Trusts for US Citizens and Residents: Separating Myth from Reality (Fourth Quarter 2006)

Presentations and Events

- Transcontinental Trusts: International Forum (June 4-5, 2020) | *Panelist* | *Global Litigation Round-Up*
- Trust & Estates Litigation Forum (February 25–26, 2020) | *Speaker* | *Litigation and exotic assets: Cars, carats, cabernet, crypto and cannabis stocks*
- Private Client Forum Americas 2020 (February 5–7, 2020) | *Speaker*

- BelleCapital International (December 5, 2019) | *Speaker* | *Coming to a Theater Near You: United States Private Client Planning and Litigation Developments*
- Bar & Karrer AG (December 4, 2019) | *Speaker* | *Coming to a Theater Near You: United States Private Client Planning and Litigation Developments*
- Legal Week International Private Client Forum (November 14, 2019) | *Speaker* | *How will International Financial Centres Evolve in the Next Decade? Will Millennials and Gen Z Want to Use Them?*
- Private Client Global Elite Mastermind (November 13, 2019) | *Speaker* | *The New Constants: Change and Controversy*
- Bonelli Erede Lombardi Studio Legale (November 12, 2019) | *Speaker* | *Coming to a Theater Near You: United States Private Client Planning and Litigation Developments*
- NYSBA Sophisticated Institute (November 8, 2019) | *Chair and Speaker* | *All Present and Accounted For: Proactively Preparing Fiduciary Accountings to Facilitate Pre- and Post- Mortem Planning and Mitigate Risk*
- Katten Private Wealth Fiduciary Seminar (October 15, 2019) | *Speaker*
- IBA Annual Conference (September 24, 2019) | *Speaker* | *The Cook, The Thief, Their Spouse and Their Lover*
- ACTEC 2019 Mid-Atlantic Regional Meeting (September 13–15, 2019) | *Participant* | *The Taxman Cometh: Settling Tax Controversies and Using Taxes to Settle Other Disputes*
- Vacation Home or Tax Trap: The Need to Coordinate US and Mexican Planning (June 25, 2019) | *Speaker*
- STEP Israel Annual Conference (June 18-19, 2019)
- Transcontinental Trusts International Forum (June 6, 2019) | *Speaker* |*The 21st Century Family*
- Bar & Karrer AG (May 2, 2019) | *Speaker* | *United States Private Client Planning and Litigation Developments*

- Transcontinental Trusts Geneva (April 30, 2019) | *Speaker* | *Is the USA the new Jurisdiction of Choice? Opportunities and Pitfalls Across the Pond*
- Transcontinental Trusts Geneva (April 30, 2019) | *Speaker* | *Crystal Ball Gazing: Where is the Private Client Industry Heading?*
- Private Client Forum Americas (March 27–29, 2019) | *Speaker* | *Everything old is new again* | *Sailing to Philadelphia* | *I fought the law*
- Estate Planning Council of Eastern NY (March 13, 2019) | *Speaker* | *Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change*
- Trust and Estates Litigation Forum (March 8, 2019) | *Speaker* | *Using Taxes to Resolve Estate and Trust Disputes*
- STEP Alpine Conference (January 18, 2019) | *Speaker* | *"Famous Disasters in Family Succession: What NOT to Repeat?* | *United States Private Client Planning and Litigation Developments*
- The 21st Century Family (October 30, 2018) | *Presenter*
- Mitigating Fiduciary Risk (July 2018) | *Speaker*
- Trusts & Estates Spring Meeting 2018 (May 3–6, 2018) | *Presenter* | *Pressing the Do Over Button: A Practitioners Perspective on Strategies for Modifying Wills and Trusts After Formation*
- 2017 Private Client Forum Asia (December 7, 2017) | *Presenter* | *Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change*
- 15th Annual Sophisticated Trusts and Estates Institute Live Webcast (November 9, 2017) | *Chair*
- Legal Week International Private Client Forum (November 2–4, 2017) | *Participant* | *All's Well That Ends Well – Updates on planning for Divorce*
- Joint Tax & Estate Planning Seminar (October 26, 2017) | *Presenter* | *Pressing the Do-Over Button: Strategies for Modifying Wills and Trusts After Formation*

Joshua S. Rubenstein

Partner

- IBA Annual Conference Sydney 2017 (October 8–13, 2017) | *Participant* | *Planning for life after death: surrogacy and the status of frozen genetic material after death, property rights of the body and their impact on the laws of succession*
- Private Client Roundtable (October 4, 2017) | *Speaker*
- Rights of Privacy and Publicity After Death: The Problems of Celebrity Clients (June 20, 2017) | *STEP (Society of Trust and Estate Practitioners)*
- Invasions of Privacy as a Result of Information Exchange (June 20, 2017) | *STEP (Society of Trust and Estate Practitioners)*
- STEP Israel 2017 Annual Conference (June 20, 2017)
- International Variables in the Estate Planning Relationship: Understanding What Your Client Brings to the Table (June 17, 2017) | *ACTEC (American College of Trust and Estate Counsel)*
- I'm an American: Get Me Out of Here - The U.S. Dilemma (June 13, 2017) | *Transcontinental Trusts Litigation Summit*
- Using Tax Planning to Resolve Trusts and Estates Controversies (June 7, 2017) | *City National Bank*
- Wealth Conservation, Estate Planning, and Planned Giving (June 2, 2017) | *American University*
- Mitigating Fiduciary Risk (June 2017) | *Presenter*
- Recognition and Taxation of Usufructs in the United States (May 23, 2017) | *IAETL (International Academy of Estate and Trust Law*
- Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change (May 16, 2017) | *The Associated: Jewish Community Federation of Baltimore, Inc.*
- Transcontinental Trusts: International Forum 2017 (May 4–5, 2017) | *Presenter* | *Crystal Ball Gazing: 5 Year Plan for the Offshore Jurisdictions*

- Discussion of the Possible Tax Law Changes Coming out of the US as a Result of the New Trump Administration; and Migrating Trusts to the US (May 5, 2017) | *Transcontinental Trusts: International Forum*
- Migrating Trusts to the US (May 5, 2017) | *Transcontinental Trusts: International Forum*
- Non-Tax Reasons For or Against Structures and Where to put my Structure and Why (April 27, 2017) | *International Wealth Advisors Forum*
- Trust and Estates Profession (April 24, 2017) | *Columbia University's Deans Luncheon*
- CRS – Common Reporting Standard (April 7–8, 2017) | *No Name Discussion Group*
- Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change (March 7, 2017) | *Charlotte Estate Planning Council*
- I Fought the Law: Lessons Learnt From the Largest US Tax Fraud Case In US History (February 16, 2017) | *Legal Week Private Client Forum Americas*
- What's Your Name, Who's Your Daddy: CRS In Action (February 15, 2017) | *Legal Week Private Client Forum Americas*
- Using Tax Planning to Resolve Trusts and Estates Controversies (January 24, 2017) | *Wilmington Trust*
- Tax and Estate Planning Considerations for Foreign Persons Owning U.S. Assets: A Deeper Dive (January 11, 2017) | *Heckerling Institute*
- 2704(b) Proposed Regulations and Other 'Heads I Win, Tails You Lose' Games: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change (November 17, 2016) | *Wilmington Trust*
- Planning for Life After Death, the Laws of Succession vs. New Biology (November 10, 2016) | *Legal Week Private Client Forum Europe*
- Mitigating Fiduciary Risk (September 29, 2016) | *Presenter*

- Posthumous Conception and Related Issues (September 23, 2016) | *STEP New York Conference*
- Asset Preservation Divorce Planning (September 19, 2016) | *International Bar Association (IBA) Annual Meeting*
- Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change (September 7, 2016) | *Presenter*
- Enduring Power of Attorney, Turn and Face the Strange Changes, Trusts Tax Planning (June 15, 2016) | *STEP Israel Annual Conference*
- Lessons from the Wylys (June 15, 2016) | *STEP Israel Annual Conference*
- STEP Canada 18th National Conference (June 9–10, 2016) | *Presenter* | *Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change*
- The International Academy of Estate and Trust Law (May 22–27, 2016) | *Presenter* | *Planning for Life After Death: The Laws of Succession vs. the New Biology?*
- Transcontinental Trusts: International Forum 2016 (May 9–10, 2016) | *Presenter* | *Famous Will and Trust Contests: Lessons from the Land of Litigation*
- International Wealth Advisors Forum (May 4–6, 2016) | *Co-present* | *Cross-Border Mental Capacity Issues*
- Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change (March 18, 2016) | *Presenter*
- Legal Week Trust & Estates Litigation Forum 2016 (March 10–12, 2016) | *Panelist* | *Review-Preview: The 10-Year Time Capsule*
- Private Client Forum Americas (February 10–12, 2016) | *Chair*

- 50th Annual Heckerling Institute on Estate Planning (January 11–15, 2016) | *Presenter* | *Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change* | *Estate Planning for Same-Sex and Unmarried Couples after Obergefell: Detriment or Opportunity?*
- Legal Week International Private Client Forum 2015: The Responsibility of Wealth (November 12, 2015) | *Panelist* | *The Responsibility of Lawyers*
- International Swaps and Derivatives Association (November 3, 2015) | *Panelist* | *The 2002 ISDA Master Agreement, Understanding the ISDA Master Agreements Conference*
- Practicing Law Institute (October 21, 2015) | *Panelist* | *Principal Issues for consideration and Negotiation in Derivatives Documentation, Advanced Swaps and Other Derivatives 2015*
- International Trusts & Private Client Conference (October 2, 2015) | *Speaker* | *This House Believes That the Right to Privacy Is Dead*
- Same-Sex Marriage: How The Supreme Court Decision Affects Estate Planning (July 21, 2015) | *Presenter*
- STEP Chicago Luncheon Meeting (June 2, 2015) | *Presenter* | *Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change*
- International Wealth Advisors Forum (May 4–6, 2015) | *Presenter* | *Creative Solutions for Intra-Family Disputes*
- IBC's Transcontinental Trusts: Bermuda Forum (April 27–28, 2015) | *Panelist* | *The Good, The Bad and The Ugly: Changes Coming to a Theatre Near You From the United States?*
- 34th Annual Kansas City Estate Planning Symposium (April 23–24, 2015) | *Presenter* | *Estate Planning for Same-Sex Unmarried Couples: Detriment or Opportunity?*
- International Swaps and Derivatives Association (April 15, 2015) | *Panelist* | *The New Regulatory Environment of Commodity Derivatives*

- 20th Annual International Wealth Transfer Practice Law Conference: The Future of Private Wealth Planning – More Than Just Compliance? (March 2, 2015) | *Panelist*
- Private Client Forum Americas 2015 (February 6, 2015) | *Speaker* | *The Best is Yet to Come - A Look at How the Private Client Advisor Role has Developed Over the Years*
- The Impact of Matrimonial Laws Upon International Estate Planning (January 28, 2015) | *Presenter*
- 49th Annual Heckerling Institute on Estate Planning (January 15–16, 2015) | *Speaker* | *Family Governance: Mumbo Jumbo or Credo?* | *Speaker* | *Planning for Life After Death: Laws of Succession vs. The New Biology*
- Heads I Win, Tails You Lose: Advising the Wealthy in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change (January 7, 2015) | *Presenter*
- 12th Annual Sophisticated Trusts & Estates Law Institute | New York State Bar Association (December 11–12, 2014) | *Presenter and Institute Chair* | *Pressing the "Do Over" Button: Strategies for Modifying Wills and Trusts After Formation*
- STEP Global Congress (November 6–7, 2014) | *Panelist* | *Mental Capacity & Cross-Border Estates Special Interest Groups*
- 18th Annual Tax and Estate Planning Seminar | Jewish Community Federation & Endowment Fund (October 30, 2014) | *Presenter* | *Pressing the "Do Over" Button: Strategies for Modifying Wills and Trusts After Formation* | *Presenter* | *Planning for Life After Death: Laws of Succession vs. The New Biology*
- Heads I Win, Tails You Lose: Advising the Global Super Rich in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change (June 30, 2014) | *Presenter*

- STEP Israel Annual Conference (June 24–25, 2014) | *Presenter* | *Heads I Win, Tails You Lose: Advising the Global Super Rich in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change*
- ACTEC 2014 Summer Meeting (June 19–22, 2014) | *Speaker* | *Haute Cuisinart – Estate Planning for the Blended Family*
- STEP San Francisco Seminar (February 4, 2014) | *Presenter* | *Heads I Win, Tails You Lose: Advising the Global Wealthy in Times Protracted and Unprecedented Political, Economic, Cultural and Scientific Change*
- Estate Planning for Same-Sex and Unmarried Couples (January 17, 2014) | *Speaker*
- Private Wealth London (December 5, 2013) | *Speaker* | *Key Drivers for North American Private Clients*
- Emerging Trends in Advising the Global Super Rich in Times of Protracted and Unprecedented Political, Economic, Cultural and Scientific Change (December 3, 2013) | *Speaker*
- Advanced Tax Institute: Estate Planning Issues (November 19, 2013) | *Speaker* | *Immediate Pre- and Post-Mortem Planning Opportunities*
- 22nd International Trust & Tax Planning Summit (November 19–20, 2013) | *Panelist* | *The Clash of the Jurisdictions – Contrasting Structural & Risk Advantages of Mature & Emerging Jurisdictions for Latin America and Forfeiture – To Challenge or Not to Challenge, That Is the Question*
- 11th Annual Sophisticated Trusts & Estates Institute (November 7–8, 2013) | *Speaker* | *Update: Estate Planning for Same Sex and Unmarried Couples*
- 2013 AICPA National Tax Conference (November 4–5, 2013) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- Charlotte Estate Planning Council Luncheon (October 22, 2013) | *Speaker* | *Estate Planning for Same-Sex and Unmarried Couples*
- 62nd Tulane Tax Institute (October 16–18, 2013) | *Speaker* | *Estate Planning for Same Sex and Unmarried Couples*

- 2013 Annual Conference of the International Bar Association (October 9, 2013) | *Speaker* | *Mobile Marriage and Divorce: What Is Mine Is Mine, What Is Yours Is Mine*
- 2nd International Private Client Conference: Russia & Commonwealth of Independent States 2013 (October 8–10, 2013) | *Speaker* | *The Global Trend Towards International Information Sharing and Tax Harmonisation, and What It Means for the Russian/CIS Client*
- Mourant Ozannes' International Trusts and Private Client Conference 2013 (October 4, 2013) | *Panelist* | *Where would you locate your trust and why?*
- Private Client Forum Singapore (September 12, 2013) | *Panelist* | *Future of Wealth Management in Southeast Asia*
- Private Client Forum Hong Kong (September 10, 2013) | *Panelist* | *Moving into a World of Automatic Information Exchange* | *Panelist* | *Tax Evasion and Planning Implications*
- Representing Estate and Trust Beneficiaries and Fiduciaries (July 18, 2013) | *Speaker* | *Using Taxes to Settle Disputes*
- In the Wake of *Windsor* and *Perry*: Estate Planning for Same Sex and Unmarried Couples (July 17, 2013) | *Panelist*
- AICPA Advanced Estate Planning Conference (July 16, 2013) | *Speaker* | *Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- 33rd Annual Estate Planning Retreat (June 13–15, 2013) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- Hudson Valley Estate Planning Council Meeting (June 12, 2013) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- Greater New Jersey Estate Planning Council Annual Special Event (June 12, 2013) | *Speaker* | *Revisiting Our Estate Planning Bag of Tricks... After 12 Years of Constant Transfer Tax Change*
- Hudson Valley Estate Planning Council (June 12, 2013) | *Presenter* | *Pressing the "Do Over" Button: Strategies for Modifying Wills and Trusts after Formation*

- International Wealth Advisors Forum (May 8–10, 2013) | *Speaker* | *Property Regimes and Marital Claims*
- Estate Planning and Beyond for Same Sex and Unmarried Couples (April 12, 2013) | *Panelist*
- Legal Week Trust & Estates Litigation Forum (March 14–16, 2013) | *Panelist* | *Can a Trustee Dodge the Bullet?*
- STEP Cayman Lecture (February 12, 2013) | *Presenter* | *Famous Estate Contests: Lessons from the Land of Litigation?*
- Legal Week Private Client Forum Americas (January 30–February 1, 2013) | *Chair*
- Strategies for Modifying Wills & Trusts After Formation | Estate Planning Council of Eastern New York (January 22, 2013) | *Presenter* | *Pressing the "Do Over" Button: Strategies for Modifying Wills and Trusts After Formation*
- Wealth Forum Brazil (October 25–26, 2012) | *Speaker* | *Understanding How the Trust Structure Works for Brazilian Families*
- IBA 2012 Annual Conference (September 30–October 5, 2012) | *Co-Chair* | *Family Disputes Involving Trusts: From the Errant Beneficiary to the Grantor Giving It Away in the Wrong Direction*
- At Death's Door Without an Estate Plan (September 5, 2012) | *Presenter*
- AICPA's Advanced Estate Planning Institute (July 23–25, 2012) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- The 38th Annual Probate & Trust Law Section Conference (June 4–5,2012) | *Speaker* | *Pressing the Do-Over Button: Strategies for Modifying Wills and Trusts after Formation* | *Speaker* | *Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- Society of Trust and Estate Practitioners Israel Annual Conference (May 28–30, 2012) | *Speaker* | *Cross-Border Succession & International Estate Planning*

- 2012 International Wealth Advisors Forum (May 8–10, 2012) | *Speaker* | *Family Office*
- Annual American Transfer Idols Seminar (May 4, 2012) | *Speaker* | *Using Taxes to Settle Trusts and Estate Disputes*
- Florida Bar Tax Section's "Transfer Tax Idols" (May 4, 2012) | *Speaker* | *Using Taxes to Settle Trusts and Estate Disputes*
- NYSBA Trusts and Estates Law Section Spring Meeting (May 3–6, 2012) | *Sponsor*
- A Gala Tribute to Mary Rodgers Guettel (April 30, 2012) | *Sponsor*
- American Heart Association Breakfast Conference (April 26, 2012) | *Speaker* | *Using Taxes to Settle Trust and Estate Disputes*
- Planning During Turbulent Times (April 26, 2012) | *Presenter*
- 26th Annual ALI-ABA Course of Study for Advanced Estate Planning Techniques (March 22–23, 2012) | *Speaker* | *Pressing the 'Do Over' Button: Strategies for Modifying Wills and Trusts After Formation*
- Philadelphia Estate Planning Council (February 21, 2012) | *Speaker* | *Planning for Life After Death: Laws of Succession vs. The New Biology*
- Southwest Florida Estate Planning Council (February 7, 2012) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- STEP Luncheon Conference (December 15, 2011) | *Speaker* | *Planning for Life After Death: Laws of Succession vs. The New Biology*
- Private Client Roundtable Discussion (December 13, 2011) | *Panelist* | *Planning Opportunities: Resolving Conflicts in Swiss/U.S. Cross-Border Estates*
- 2011 Dean's Visiting Speaker Luncheon (November 22, 2011) | *Speaker*
- 3rd Annual Trust Litigation Symposium (November 8, 2011) | *Speaker* | *Conflicts in Succession*
- Private Client Legal Forum 2011 (November 3–5, 2011) | *Speaker* | *Facilitating a Smooth and Successful Transition of Wealth to the Next Generation*

- UJA-Federation of New York's 42nd Annual New York Estate, Tax & Financial Planning Conference (September 27, 2011) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- 32nd Annual Estate Planning & Fiduciary Program (July 21, 2011) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- American College of Trust and Estate Counsel Summer Meeting (June 22–26, 2011) | *Speaker*
- The International Academy of Estate & Trust Law (May 22–27, 2011) | *Speaker* | *Impact of Matrimonial Laws Upon International Estate Planning*
- Friends Seminary Seminar (May 20, 2011) | *Speaker* | *Wealth Conservation, Estate Planning and Planned Giving*
- International Wealth Advisors Forum (May 8–10, 2011) | *Speaker* | *How Do You Pick Your Trustee?*
- Greater Miami Jewish Federation's Professional Advisory Committee Meeting (April 28, 2011) | *Speaker* | *Planning for Life After Death: The Ability to Control the Disposition of One's Remains and Posthumous Use of One's Genetic Material*
- ACTEC 2011 Annual Meeting (March 7–13, 2011) | *Speaker*
- Trust and Estates Litigation Forum 2011 (March 3–5, 2011) | *Speaker* | *Shock and Law – The Long Arm of the U.S. Courts*
- Estate Planning & Community Property Law Journal Seminar (February 18, 2011) | *Speaker* | *Planning for Life After Death: The Ability to Control the Disposition of One's Remains and Posthumous Use of One's Genetic Material*
- Annual CLE Program and Cocktail Reception (February 16, 2011) | *Presenter* | *New York State Legislative Update*
- The 13th Annual Estate, Tax, Legal and Financial Planning Seminar (February 9, 2011) | *Speaker* | *Planning for Life After Death: Laws of Succession vs. The New Biology*

- 2011 Estate Planners' Day (January 21, 2011) | *Speaker* | *Estate Planning, Administration and Litigation: Let's Take It From the Top*
- Hottinger & Partners S.A. Roundtable Conference (January 13–15, 2011) | *Speaker*
- The HIRE Act and FATCA: Detriment or Opportunity? (January 11, 2011) | *Speaker*
- NYSBA 8th Annual Sophisticated Trusts and Estates Law Institute (November 18–19, 2010) | *Presenter*
- Private Client Forum Europe (November 11–13, 2010) | *Panelist* | *Basics of International Estate Planning: Arrivals and Departures—Practical Requirements for Leaving One Country and Going to Another*
- 15th Annual Professionals Symposium (November 4, 2010) | *Speaker* | *Planning for Life After Death: The Ability to Control the Disposition of One's Remains and the Posthumous Use of One's Genetic Material*
- Thirty-Sixth Annual Notre Dame Tax & Estate Planning Institute (October 28–29, 2010) | *Speaker* | *Wealth Conservation and Planned Giving for Art Collectors*
- STEP Chicago (October 27, 2010) | *Speaker* | *Community Property Issues in Non-Community Property States of the United States*
- Tax Discussion Group (October 25, 2010) | *Speaker* | *2010 End of Year Planning Opportunities*
- STEP Private Client Awards 2010 (October 19, 2010) | *Sponsor*
- Private Client Forum Asia Conference (October 12, 2010) | *Speaker* | *Trust Litigation: Perils and Pitfalls*
- International Bar Association Conference (October 3–8, 2010) | *Speaker* | *Coming and Going: Focus on Coming – Pre-Immigration Strategies for the Private Client*
- Northern Trust Global Wealth Alliance Meeting (September 29, 2010) | *Speaker*
- Northern Trust Wealth Management Group Family Financial Forum (September 29–October 1, 2010) | *Panelist*

- 41st Annual Sidney Kess New York Estate, Tax & Financial Planning Conference (September 16, 2010) | *Speaker* | *Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- International Wealth Advisors Forum (September 1–3, 2010) | *Speaker* | *Is Private Client Tax Planning Dead? How are External Influences Affecting Our Approach to Tax Planning? A Comparison of Available Structures to Navigate the Mine Fields*
- Representing Estate and Trust Beneficiaries and Fiduciaries (July 15–16, 2010) | *Speaker* | *Using Tax Law to Settle Disputes*
- Estate Planning Conference (July 13, 2010) | *Presenter*
- 34th Annual Advanced Estate Planning & Probate Course (June 23–25, 2010) | *Speaker* | *Planning for Life After Death: Laws of Succession vs. the New Biology*
- STEP Miami Annual Conference: Advising International Families in a Time of Dramatic Change (June 11, 2010) | *Speaker* | *Community Property Issues in Non-Community Property States in the United States*
- Contemporary Arts Council Legacy Program (June 3, 2010) | *Speaker* | *Wealth Conservation and Planned Giving for Art Collectors*
- 32nd Annual Estate Planners Day (May 20, 2010) | *Speaker* | *Planning for Life After Death: Laws of Succession vs. the New Biology*
- Citywealth Magic Circle Awards 2010 (May 13, 2010) | *Honoree*
- Trusts and Estates Law Section Spring Meeting (May 13–15, 2010) | *Sponsor*
- 21st Annual Spring Symposia (May 6–7, 2010) | *Speaker* | *Are Ethical Rules Immutable? Transactional Issues Where the Ethical Rules May Change Depending on Your Location* | *Speaker* | *Estate Planning for People Living with Chronic Illness*
- Estate Planners Day (May 5, 2010) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- Estate Planning for Unmarried Couples: Detriment or Opportunity? (May 5, 2010) | *Speaker*

- Estate Planning for Unmarried Couples: Detriment or Opportunity? (April 28, 2010) | *Speaker*
- International Wealth Advisors Forum (April 21–23, 2010) | *Panelist* | *How Are External Influences Affecting Our Approach to Tax Planning?*
- Legal Week Trusts & Estates Litigation Forum (February 25–27, 2010) | *Panelist* | *Lessons from the Frontline*
- Impact of New Ethics Rules on the Trusts and Estates Community (February 10, 2010) | *Presenter* | *2009 Legislative Update*
- 44th Annual Heckerling Institute on Estate Planning (January 25–29, 2010) | *Speaker* | *Planning for Life After Death: Laws of Succession vs. the New Biology* | *Speaker* | *Using Taxes to Settle Trust and Estate Litigation*
- Happy New Year! What's Happening and What Do I Do? (January 12, 2010) | *Speaker*
- IBC—International Trusts Congress 2009 (December 1–2, 2009) | *Speaker* | *Planning for International US Citizens*
- 7th Annual Sophisticated Trusts & Estates Law Institute (November 19–20, 2009) | *Speaker*
- Legal Week's Private Client Forum 2009 (November 12–14, 2009) | *Speaker*
- Advanced Tax Institute—Estate Planning Issues (November 4, 2009) | *Speaker* | *Estate Planning for Unmarried Couples – Detriment or Opportunity?*
- Tulane Tax Institute (October 28–30, 2009) | *Speaker* | *Tax Planning for Unmarried Couples*
- Trusts & Estates Litigation Symposium (October 13, 2009) | *Speaker* | *Using Taxes to Resolve Trust & Estate Disputes*
- STEP Private Client Awards 2009/2010 (October 13, 2009) | *Sponsor*
- International Wealth Advisors Forum (May 20–22, 2009) | *Speaker* | *Expatriation as an Option for Uncertain Times*
- Citywealth Magic Circle Awards 2009 (May 14, 2009) | *Sponsor*

- Trusts and Estates Law Section Spring Meeting (March 19–22, 2009) | *Speaker* | *Changing Trust Situs*
- ACTEC 2009 Annual Meeting (March 5–8, 2009) | *Speaker* | *Planning for Life After Death*
- 43rd Annual Heckerling Institute on Estate Planning (January 12–16, 2009) | *Speaker, Estate Planning for Unmarried Couples: Detriment or Opportunity?*
- Private Client Forum 2008 (November 13–15, 2008) | *Speaker* | *Family Wealth and Business - Achieving Fair Process, Identifying Risk and Avoiding War*
- The Future of Trusts (November 4, 2008) | *Speaker* | *The Family Partnership*
- Trusts & Estates Litigation Forum (March 1–3, 2007) | *Moderator* | *Third Party Claims: Grounds for Contest - Capacity, Undue Influence and Improper Execution*
- 2007 Tax Institute (January 22–24, 2007) | *Panelist* | *Using Taxes to Resolve Trust and Estate Disputes*