



tax and trusts & estates

tax planning

We regularly advise individuals, corporations and partnerships on all aspects of income tax planning, including:

- corporate acquisitions, sales, and mergers
- investments in partnership, LLCs and other business and investment entities
- tax deferred exchanges of real estate
- foreign investment in US companies, partnerships and US real estate
- complying with US international reporting requirements, including FBARs, unreported foreign bank accounts and other reportable assets

estate planning

Our attorneys have expertise in all aspects of creative estate planning, as well as the details of post-death planning and administration with special emphasis on:

- Customized gift and estate planning for high-net-worth individuals
- Representation of fiduciaries and beneficiaries in disputed estate and trust administration matters

In our estate planning practice, we prepare all documents including:

- Wills, living trusts, powers of attorney and irrevocable trusts
- Family limited partnerships and other vehicles to transfer wealth efficiently

In doing so, we pride ourselves on tailoring our estate planning services so that each client's estate plan is customized to fit that client's wealth, asset mix, family situation and planning goals.

For our clients with larger estates, we have developed planning approaches for specific assets including:

practice contacts

Allan B. Cutrow
Jeffrey K. Eisen
David Wheeler Newman

attorneys

Jeffrey D. Davine
Karl de Costa
Justin P. Farrell
Seth W. Krasilovsky
Robert J. Lowe
Chris Luna
Natalia Momtsios
Autumn Ronda
Andrew C. Spitzer

related practices areas

transactional tax



- Retirement plans, Art collections, and Copyrights (music, literary properties, etc.)

We also advise global families whose family members live in a number of different countries on coordinated global gift and estate planning with a view to preserving family wealth for future generations.

nonprofit organizations and philanthropic planning

We represent a wide range of tax-exempt organizations including public charities, private foundations, museums, hospital foundations, religious institutions, charitable trusts, trade associations, universities and schools.

We have considerable expertise in the legal and tax aspects of charitable gift planning and a national reputation for innovation and creativity in structuring current and deferred charitable gifts.

trust and estate administration

Our practice group also counsels executors, administrators, trustees, guardians and conservators in matters of estate, trust, guardianship and conservatorship administration. These matters require the necessary attention to detail throughout the administration process, ranging from identification and valuation of assets, transferring title to those assets, and making distributions to beneficiaries of estates and trusts. Since one of the principal duties of a fiduciary during post-mortem administration is compliance, we also prepare, or assist in the preparation of, estate tax returns. We also counsel the fiduciary through the estate tax (or gift tax) audit process.

trust and estate litigation

Our team of experienced trusts and estates litigation attorneys represent individuals, banks and trust companies, private professional fiduciaries, charitable organizations and educational institutions in a broad range of trust, estate, conservatorship and guardianship disputes and proceedings in probate courts throughout California.

tax planning for trusts and estates

Our tax department represents high-net-worth individuals and their closely held companies in all aspects of creative estate planning, post-death planning, trust and estate administration, and related trust and estate litigation.

tax controversy & litigation

We assist clients in a wide variety of federal, state and local tax controversies relating to income tax, estate and gift taxes, sales and use taxes, gross receipts taxes and property taxes. We represent both domestic and foreign clients in complex tax audits and examinations by the Internal Revenue Service, the California Franchise Tax Board, the California Employment Development Department, the California State Board of Equalization, and other state and Local taxing authorities. Our attorneys include a former Special Assistant U.S. Attorney and an Attorney (Estate Tax) with the Internal Revenue Service.



headlines

12 MSK Attorneys Named to the 2026 Edition of Southern California *Super Lawyers*
Super Lawyers , February 20, 2026

Jeffrey Eisen Represents Muhammad Ali Estate in U.S. Forever Stamp Recognition
January 15, 2026

MSK's 2026 Partner Promotions Featured in *Los Angeles Business Journal*
Los Angeles Business Journal , December 22, 2025

Mitchell Silberberg & Knupp Names New Partners
December 15, 2025

Allan Cutrow Awarded the Bruce I. Hochman Maimonides Torch of Justice Award by the Jewish Federation Los Angeles
December 1, 2025

Jeffrey Eisen Named to *The Hollywood Reporter's* 2025 "Legal Troubleshooters" List
The Hollywood Reporter, November 19, 2025

37 MSK Attorneys Named Among *The Best Lawyers in America*® for 2026
Best Lawyers, August 21, 2025

MSK Named to the 2025 NLJ 500 Report
National Law Journal , June 5, 2025

13 MSK Attorneys Named to the 2025 Edition of Southern California *Super Lawyers*
February 18, 2025

Best Lawyers Recognizes Mitchell Silberberg & Knupp in 2025 "Best Law Firms" Rankings
November 7, 2024

Jeffrey Eisen Named to *The Hollywood Reporter's* 2024 "Power Lawyers: Troubleshooters" List
The Hollywood Reporter, October 23, 2024

34 MSK Attorneys Named Among *The Best Lawyers in America*© for 2025
August 15, 2024

12 MSK Attorneys Named to the 2024 Edition of Southern California *Super Lawyers*
January 10, 2024

MSK Welcomes Partner Chris Luna
December 29, 2023



Jeff Eisen Named a "Power Lawyer: Troubleshooter" by The Hollywood Reporter
The Hollywood Reporter, September 20, 2023

MSK Partners Allan Cutrow and David Wheeler Newman Recognized in *Chambers USA High Net Worth 2023*
Legal Guide
Chambers, August 22, 2023

38 MSK Attorneys Named Among *The Best Lawyers in America*® for 2024
August 17, 2023

15 MSK Attorneys Named to the 2023 Edition of Southern California *Super Lawyers*
January 10, 2023

Best Lawyers Recognizes Mitchell Silberberg & Knupp in 2023 "Best Law Firms" Rankings
November 2, 2022

Mitchell Silberberg & Knupp Partner Robin C. Gilden Named a 2023 Lawyer of the Year by The Best Lawyers in
America®
Business Wire, August 23, 2022

16 MSK Attorneys Named to the 2022 edition of Southern California *Super Lawyers*
January 20, 2022

U.S. News & World Report Recognizes Mitchell Silberberg & Knupp in 2022 "Best Law Firms" Rankings
November 4, 2021

26 MSK Attorneys Named Among *The Best Lawyers in America*® for 2022
August 19, 2021

14 MSK Attorneys Named to the List of 2021 Southern California *Super Lawyers*
January 21, 2021

U.S. News & World Report Recognizes Mitchell Silberberg & Knupp in 2021 "Best Law Firms" Rankings
November 2020

33 MSK Attorneys Named Among *The Best Lawyers in America*® for 2021
August 20, 2020

Autumn Ronda Appointed to Kidsave's Board of Trustees
June 1, 2020

27 MSK Attorneys Named Among *The Best Lawyers in America*® for 2020
August 15, 2019



MSK Welcomes Partner Autumn Ronda
March 6, 2019

MSK Attorneys Named to the List of 2019 *Southern California Super Lawyers*
January 30, 2019

MSK Client Inpixon Closes Oversubscribed Rights Offering with Gross Proceeds of \$12M
January 16, 2019

U.S. News & World Report Recognizes MSK Among 2019 "Best Law Firms" Rankings
November 1, 2018

The Best Lawyers in America© 2019 Recognizes 24 Attorneys from MSK
August 15, 2018

MSK Leads Complex Cross-Border LBO for Client Intellectual Technology, Inc. (ITI)
January 25, 2018

MSK Elects S. Eva Wolf and Janice Luo to Partnership
December 21, 2017

Jeff Eisen Named Among *The Hollywood Reporter's* Power Lawyers
December 4, 2017

MSK Named Among 2018 Best Law Firms
November 1, 2017

The Best Lawyers in America© 2018 Recognizes 24 Attorneys from Mitchell Silberberg & Knupp LLP
August 15, 2017

MSK Welcomes Partner Charles Kolstad
June 1, 2017

Mitchell Silberberg & Knupp Names Jeffrey Eisen Co-Chair of Firm's Trusts & Estates Practice
February 2, 2017

MSK Attorneys Named to the 2017 List of *Super Lawyers*
January 20, 2017

MSK Named Among 2017 Best Law Firms
November 1, 2016

The Best Lawyers in America© 2017 Recognizes 22 Attorneys from Mitchell Silberberg & Knupp
August 22, 2016



MSK Named to the NLJ 500 Report
June 29, 2016

Stephen A. Bauman Named Of Counsel
January 28, 2016

MSK Launches Its New Trusts & Estates Blog
May 27, 2014

David Newman Represents UCLA Foundation in Fielding's \$50 Million Donation
February 18, 2012

news

Jeffrey Eisen Featured in *Mondaq*
Mondaq, July 29, 2025

Allan Cutrow Quoted in the Wall Street Journal
June 4, 2023

Jeff Eisen appears on the *Today Show*
January 31, 2023

Robert Lowe Quoted in *Law360*
January 2, 2023

Jeff Eisen Named a "Power Lawyer: Troubleshooter" by The Hollywood Reporter
The Hollywood Reporter, November 21, 2022

Jeffrey Eisen Quoted in *Tax Notes*
April 21, 2020

Jeffrey Davine Quoted in *Law360*
January 2, 2020

Autumn Ronda Featured in *Law360* for Move to MSK
March 7, 2019

Autumn Ronda Featured in *Law360* for Move to MSK
March 7, 2019

Jeff Eisen Quoted in *Bloomberg BNA*
February 27, 2019



Jacey Hayes Featured in *Angeleno Magazine*
December 1, 2018

Jeff Eisen Quoted in *Bloomberg BNA*
August 25, 2018

Jeff Eisen Quoted in *The Hollywood Reporter* on New Tax Law
December 27, 2017

Robin Gilden Quoted in *Variety*
December 19, 2017

Jeff Eisen Quoted in *Law360*
November 3, 2017

Jeffrey Eisen Featured in *Law360*
October 6, 2017

Bloomberg BNA's Daily Report for Executives Quotes Eva Wolf on IRS Case Regarding Estate Tax Rules
Bloomberg BNA, May 26, 2017

Charles Kolstad Quoted in *Mansion Global* on Property Taxes
Mansion Global, May 25, 2017

Jeffrey Eisen Quoted in *BloombergBNA*
BloombergBNA, February 28, 2017

Jeffrey Eisen Highlighted in the *Daily Journal*, *WealthAdviser*, and *Attorney at Law Magazine*
February 6, 2017

Jeffrey Eisen Quoted in *Bloomberg Businessweek*
February 1, 2017

David Wheeler Newman Mentioned in *Attorney At Law Magazine*
August 10, 2016

David Wheeler Newman Mentioned in *L.A. Biz*
L.A. Biz, June 28, 2016

Jeffrey K. Eisen Quoted on *CBC Radio*
May 4, 2016

Jeffrey K. Eisen Quoted in *USA Today* and *The Wall Street Journal*
May 2, 2016



David Newman Quoted in *Law360*
December 24, 2015

MSK Selected for Inclusion in 2016 US News Best Law Firms
November 2015

Law360 Quotes Charles Kolstad on IRS' 2015 Inversion Regulations
Law360, January 2, 2015

Law360 Quotes Charles Kolstad on Inversions
Law360, December 18, 2014

U.S. News & World Report Recognizes Mitchell Silberberg & Knupp in 2015 "Best Law Firms" Rankings
November 3, 2014

Law 360 Quotes Charles Kolstad on The End of "Double Irish" Tax Loophole
Law360, October 16, 2014

Law360 Quotes Charles Kolstad's Reaction to New Treasury Inversion Rules
Law360, September 23, 2014

CFO Magazine Quotes Charles Kolstad on Inversions
CFO Magazine, August 27, 2014

Fox Business Quotes Charles Kolstad on Potential Burger King Inversion
Fox Business, August 25, 2014

Law360 Quotes Charles Kolstad on Tax Inversions in the Hospitality Sector
Law360, August 25, 2014

The Best Lawyers in America© 2015 Recognizes 21 Attorneys from Mitchell Silberberg & Knupp and Names 2 Attorneys "Lawyer of the Year"
August 2014

Allan Cutrow Quoted in *Los Angeles Daily Journal*
August 2014

Bloomberg Quotes Charles Kolstad on Corporate Inversions
Bloomberg, July 28, 2014

Accounting Today Quotes Charles Kolstad on Corporate Inversions
Accounting Today, July 25, 2014

Jeffrey Davine Quoted in *Law360*
July 23, 2014



Daily Journal Quotes Charles Kolstad on Treasury's Push to Limit Corporate Inversions
Daily Journal, July 18, 2014

The Legal 500 United States 2014 Edition
June 2014

Robin Gildden Quoted in *Law360*
June 20, 2014

Daily Journal Quotes Charles Kolstad on Merger Inversions
Daily Journal, May 12, 2014

Jeffrey Davine Quoted in *Law360*
May 2, 2014

26 MSK Attorneys Named to 2014 Southern California *Super Lawyers* List
January 2014

Allan Cutrow Mentioned on *Main Street*
December 30, 2013

U.S. News & World Report Recognizes MSK in 2013-2014 "Best Law Firms" Rankings
November 2013

Four MSK Attorneys Named to Southern California's *Super Lawyers*' Rising Stars List
June 2013

26 MSK Attorneys Named to 2013 Southern California *Super Lawyers* List
January 2013

U.S. News & World Report Recognizes MSK in 2012-2013 "Best Law Firms" Rankings
November 1, 2012

21 MSK Attorneys Selected for *Best Lawyers in America 2013*
August 24, 2012

MSK Ranked Among Leading Tax Law Firms in *Tax Directors Handbook 2012*
January 26, 2012

25 Named to 2012 Southern California *Super Lawyers* List
January 23, 2012

U.S. News & World Report Recognizes MSK In 2011-2012 "Best Law Firms" Rankings
November 1, 2011



MSK Attorneys Recognized Among "The Best Lawyers in America" for 2012
August 31, 2011

Nine MSK Attorneys Named to Southern California *Super Lawyers*' Rising Stars List
June 13, 2011

Chambers USA Recognizes MSK Attorneys Among America's Leading Lawyers
June 10, 2011

The 2011 Legal 500 USA Guide Recognizes MSK Attorneys and Intellectual Property and Tax Practice Groups Among the Nation's Best
June 9, 2011

Cutrow Counsels *Time's* Stein on Estate Planning
February 28, 2011

24 Named to 2011 Southern California *Super Lawyers* List
January 25, 2011

Jeffrey Davine Selected for Taxpayer Advocacy Panel (TAP) for 2011-2013
November 23, 2010

MSK Recognized in *U.S. News & World Report/Best Lawyers* "Best Law Firms" Rankings
September 15, 2010

The 2011 Best Lawyers in America Recognized MSK Attorneys from Nine Practice Areas
August 19, 2010

28 Named to 2010 Southern California Super Lawyers List
January 26, 2010

Allan Cutrow Quoted in *The Business Press*
January 12, 2010

The Best Lawyers in America 2010
August 3, 2009

Allan Cutrow Outlines Gifting Strategies in the *Wall Street Journal*
April 8, 2009

29 Chosen to 2009 Southern California Super Lawyers List
January 30, 2009

33 Chosen to 2008 Super Lawyers Lists
November 21, 2008



The *Best Lawyers in America* 2009
September 17, 2008

The Legal 500 Ranks MSK Among "Top Firms" and Partners Among "Leading Lawyers"
June 17, 2008

MSK Home to 23 Southern California Super Lawyers for 2008
January 30, 2008

The Best Lawyers in America 2007
December 28, 2007

The Best Lawyers in America in Trusts and Estates in 2007
March 29, 2007

publications

Estate and Gift Tax Return Preparation and Audit Tips
Estate Planning Journal (WG&L), Volume 44, Number 9, September 2017

Nonprofit Industry Veteran joins Nonprofit Industry Powerhouse
June 20, 2016

4 Lessons From The Robin Williams Estate Litigation
Law360, May 26, 2015

Estate Planning: Looking at Our World Through Income Tax Glasses
67-13 USC Law School Institutes On Major Tax Planning, 2015

Tax Court Decides Art Isn't a Hobby
Los Angeles & San Francisco Daily Journal, October 29, 2014

United States Chapter, Getting the Deal Through -Outsourcing 2014
Law Business Research Ltd, 2014

Estate and Tax Guidance for Artists and Collectors
Los Angeles Lawyer, May 2014

Time to Revisit Foreigner Investing in U.S. Real Estate
Law360, November 22, 2013

How the Health Care Act Affects the Taxation of Loan-Out Corporations
Los Angeles Lawyer, May 2013



FATCA and NFFEs

Economic Daily News (Taiwan), March 13, 2012

The IRS' Amnesty Program for Foreign Account Holders: What You Need to Know

The Wrap, August 8, 2011

International Reporting Requirements for CPAs and Their Clients

Accounting Today, March 24, 2011

Comments on the Foreign Account Tax Compliance Act (FATCA)

ABA Section of Taxation, February 14, 2011

What Artworks May Come (to a Museum Near You)

The State of Fractional Charitable Giving at the Intersection of Museology and Tax Policy

Southern California Interdisciplinary Law Journal, 2011

Before You Say Yes and Move Abroad - Six Legal Issues to Consider

Financier Worldwide - Global Reference Guide: Employment & Human Resources 2010, November 2010

Tax Issues Associated with Carbon Trading Assets and the Impact of Proposed Legislation

ABA Carbon Trading and Energy Finance Committee Newsletter, April 2010

Section 181 Offers Incentives to Curb Runaway Productions

Los Angeles Lawyer magazine, 25th Annual Entertainment Law Issue, May 2009

Unresolved Issues in the Income Forecast Method of Accounting

Los Angeles Lawyer magazine, Entertainment Law Issue, May 2007

alerts

Estate and Gift Tax Impact of the "One Big Beautiful Bill"

MSK Client Alert, July 9, 2025

Understanding UPMIFA: Fiduciary Issues with Mission-Related Investing

Client Alert, May 14, 2024

New COVID Relief Legislation Provides Tax Benefit

MSK Client Alert, December 28, 2020

Proposition 19 Set to End Major Property Tax Exemption

MSK Client Alert, November 10, 2020

Do CRTs and CLTs Need To Be Registered With the CA Attorney General?

MSK Client Alert, September 3, 2020



The Magic Hour for GRATs
MSK Client Alert, July 28, 2020

Is this the Golden Age of CLATs?
MSK Client Alert, May 1, 2020

COVID-19 Tax Relief
MSK Client Alert, April 17, 2020

Charitable Contributions Show You CARE
CARES Act Tax Benefits for Charitable Contributions
MSK Client Alert, April 10, 2020

Estate Planning in the Time of COVID-19
MSK Client Alert, April 10, 2020

COVID Conversion
MSK Client Alert, April 6, 2020

Paycheck Protection for Non-Profits
Charitable Organizations May Apply for Forgivable Loans Under the CARES Act
MSK Client Alert, April 3, 2020

America CARES
Tax and Employee Benefits Provisions of the CARES Act
MSK Client Alert, March 26, 2020

Tax Filing Reprieve
Tax Return Filing and Payment Extensions
MSK Client Alert, March 23, 2020

Volatility Provides Opportunity
Estate Planning Opportunities in a Volatile, Low Interest Rate Environment
MSK Client Alert, March 20, 2020

Federal Tax Payment May Be Delayed 90 Days
MSK Client Alert, March 18, 2020

IRS Penalties Assessed Against Your Client May Not Be Valid
MSK Client Alert, January 30, 2020

Tax Act Simplifies the Private Foundation Excise Tax on Investment Income
MSK Client Alert, January 9, 2020



Tax Act Enhances Deductibility of Disaster Relief Donations *for a Limited Time Only*

MSK Client Alert, January 2, 2020

Hasta la Vista to the Reviled Nonprofit Parking Tax

MSK Client Alert, December 23, 2019

Have Independent Contractors in California? You May Need to Rethink That.

MSK Client Alert, September 18, 2019

Are you rEDDy for the Audit?

MSK Client Alert, June 5, 2019

Wealthy Californians (and Their Children) Can Breathe a Sigh of Relief

MSK Client Alert, May 29, 2019

Opportunity Zones Overview

MSK Client Alert, April 19, 2019

California Estate Tax: Gone Today, Here Tomorrow?

MSK Client Alert, April 4, 2019

Opportunity Zones Overview

MSK Client Alert, April 2, 2019

A Movable Feast

MSK Client Alert, March 28, 2019

Don't Let the IRS Yank Your Passport

MSK Client Alert, March 25, 2019

Proposed Regulations Provide Greater Flexibility in Obtaining Credit Support from Foreign Subsidiaries

MSK Client Alert, December 17, 2018

Delinquent Taxpayers May Need to Rethink Travel Plans

MSK Client Alert, November 19, 2018

Section 199A: Deal Considerations When Buying or Selling a Partnership or LLC Interest

MSK Client Alert, November 15, 2018

Is Everyone Now an Employee in California?

MSK Client Alert, May 7, 2018

#MeToo Can Be #Costly

MSK Client Alert, January 23, 2018



Has Your Partnership or LLC Agreement Been Updated to Comply with the New Tax Rules?

January 17, 2018

IRS Announces Key Estate and Gift Tax Exemptions for 2018

MSK Client Alert, October 23, 2017

The White House Framework for Tax Legislation

MSK Client Alert, October 2, 2017

New Partnership Audit Regime and Partnership M&A Transactions

MSK Client Alert, September 26, 2017

Top Six Reasons NOT to Have an Estate Plan

July 17, 2017

IRS Gives Surviving Spouses a Second (or Third) Bite at the Portability Apple

MSK Client Alert, July 10, 2017

California State Board of Equalization Gutted

MSK Client Alert, July 5, 2017

Can Charitable Remainder Trusts Avoid the Self-Dealing Rules?

MSK Client Alert, May 15, 2017

Is the Border Tax Crossing the Line?

MSK Client Alert, February 23, 2017

Understanding UPMIFA: Delegation of Management and Investment of Endowment Funds

MSK Client Alert, February 23, 2017

Estate Planning - When the Only Certainty is Unpredictability

MSK Client Alert, January 20, 2017

Understanding UPMIFA: Important Endowment Concepts

MSK Client Alert, January 3, 2017

iWill or iWon't

MSK Client Alert, December 29, 2016

Proposed IRS Regulations Could End Most Valuation Discounts for Family Entities

September 27, 2016

Important New Guidance on Charitable Remainder Annuity Trusts

MSK Client Alert, September 8, 2016



4 Things Beneficiaries Who Receive IRS Form 8971's Schedule A Must Know

MSK Client Alert, July 26, 2016

IRS Confirms - No More Phone Calls (At Least Not Initially)

MSK Client Alert, July 18, 2016

Valuation Rule For Early Termination of Net-Income Charitable Remainder Unitrusts

MSK Client Alert, June 27, 2016

Four Lessons Learned From Prince's Estate (So Far)

MSK Client Alert, May 2, 2016

Higher Learning: A Potentially Expensive Lesson About 529 Plans

MSK Client Alert, May 2, 2016

No Password? See You in Court?

MSK Client Alert, April 8, 2016

IRS Releases Draft Form 8971, Information Regarding Beneficiaries Acquiring Property From a Decedent

December 31, 2015

The Numbers Are In... er, Projected

September 18, 2015

IRS Extends Due Date For New Basis Reporting Rules

August 21, 2015

New Law Steps Up Reporting Requirements for Executors

August 11, 2015

A Trust May Be Subject to California Income Taxation if the Trustee Resides in California

April 15, 2015

California Supreme Court to Review Controversial Documentary Transfer Tax Case

January 30, 2015

Qualifying for 501(c)(3) Tax Exempt Status is Tricky

November 5, 2014

National Estate Planning Awareness Week

October 20, 2014

Equal Tax Treatment for Same-Sex Couples in the Wake of Recent Supreme Court Ruling and IRS Guidance

MSK Client Alert, January 2014



Selection of Trustees - Important Questions; Difficult Answers

MSK Client Alert, September 12, 2012

2012 Gift Tax Planning - A Golden Opportunity

MSK Client Alert, April 17, 2012

"How Will the IRS Find Out?" Here's How

MSK Client Alert, January 19, 2012

California Enforces New Isolationist View on Property Tax Exemptions for Nonprofits

MSK Client Alert, August 4, 2011

IRS Backs Off of Gift Tax on 501(c)(4) Contributions

MSK Client Alert, July 7, 2011

Potential Gift Tax Liability for Contributions to 501(c)(4)s - UPDATE #2

MSK Client Alert, May 10, 2011

Reminder: New Tax Act Includes Gift Tax Opportunities

MSK Client Alert, February 14, 2011

Trusts & Estates Alert

MSK Client Alert, December 21, 2010

Significant Tax Law Changes Under the New Tax Act

MSK Client Alert, December 20, 2010

2010: The Year Of The Taxable Gift

MSK Client Alert, September 29, 2010

Tax Provisions of The HIRE Act: Business Incentives and Offshore Compliance

MSK Client Alert, March 23, 2010

Estate Tax "Repeal"

MSK Client Alert, February 2010

events & speaking engagements

2025 Tax Act Income Tax/Charitable Contribution Provisions

November 13, 2025

One Big Beautiful Summary (Estate/Gift/GST Tax Planning)

November 13, 2025



Planned Giving & Illiquid Assets: What You Need to Know

June 5, 2025

Required Minimum Distributions After the SECURE Act and SECURE Act 2.0

April 22, 2025

Estate Planning for Family Offices: A State of Flux

November 4, 2024

Pet Trusts and Estate Planning for Animals

October 23, 2024

Advance Planning as a Tool to Prevent Financial Elder Abuse

June 26, 2024

Estate Planning With Decreasing Exemptions on the Horizon (Again!)

April 2024 Meeting

April 11, 2024

Lorman Online Course: Understand the Different Options for Taking Distributions From a 401(k) Plan and the Financial Consequences

June 2023

Health Savings Accounts (HSAs): Compliance Obligations Under the Internal Revenue Code and ERISA

February 14, 2022

Estate Planning for the Family Office Client—A State of Flux

November 1, 2021

COBRA Subsidies Under the American Rescue Plan (online course)

June 4, 2021

No Longer SECURE: How to Make Sure the SECURE Act Does Not Botch Your Client's Estate Plan

March 18, 2021

Planning for the Future, Today

The Basics of Estate Planning

September 15, 2020

Estate Planning Issues In These Pivotal and Unprecedented Times

June 3, 2020

Planning for Your Future in Changing Times

March 13, 2020



Bad Heir Day: Tortious Interference with an Expectancy
January 23, 2020

Opportunity Zones & Securities
November 14, 2019

Cross-Border Case Study Potpourri
November 12, 2019

Calculating S Corp Stock and Debt Basis: Avoiding Loss Limitations and Excess Distributions
February 13, 2019

Leave 'Em A Dollar, That Should Keep Them in Line: Effective Planning to Avoid Contests
November 7, 2018

Gifts of Copyrights, Trademarks and other Intellectual Property
October 18, 2018

It's a Mess: What Happens When You Don't Pay Attention When Your Clients Are Cross Borders
June 20, 2018

HSAs Compliance Obligations Under the Internal Revenue Code and ERISA
May 30, 2018

Primer on Ethics and Circular 230 Issues for Young Attorneys
May 10, 2018

Section 951A - Global Intangible Low-Taxed Income (GILTI) *Webinar*
April 24, 2018

Preparing Gift and Estate Tax Returns and the Audit Process
April 13, 2018

Tax Planning for Disregarded Entities: Issues, Risks, and Opportunities *Webinar*
Spring 2018

Tax Treatment of Pre-2018 Accumulated Earnings *Webinar*
Winter 2018

Taxation and Representation: Career Paths in Tax Law
February 6, 2018

Form 3520 Foreign Trust Reporting: Filing Deadlines, Requirements, and Liabilities *Webinar*
Fall 2017



Form 8865 Reporting of Foreign Partnership Income and Navigating Rules for Allocable Share of Foreign Income
Webinar

August 3, 2017

Webinar: Form 8865 - Reporting of Foreign Partnership Income

August 3, 2017

Structuring Joint Ventures with For-Profit Participants

May 15, 2017

Beach Bootcamp Part 2

April 21, 2017

Current Developments from the Courts

March 3, 2017

International Tax Forms and Reporting Requirements *Webinar*

Winter 2017

Getting Clear on Going Grey: Identifying and Addressing Diminished Capacity

February 1, 2017

Dodging Bullets and Navigating Minefields

Helpful Tips for Preparing Estate and Gift Tax Returns and Resolving Audits from Two Former IRS Attorneys

January 25, 2017

Estate Planning: Looking at Our World Through Income Tax Glasses

December 20, 2016

Estate Planning: Looking at Our World Through Income Tax Glasses

October 19, 2016

Gift Acceptance Policies and Procedures for Nonprofits

October 18, 2016

Dealing with the Self-Dealing Rules

October 18, 2016

12th Annual Jerry A. Kasner Estate Planning Symposium

September 30, 2016

Did I Really Miss That? Top 10 Common Mistakes Tax Practitioners Make in Trust and Estate Planning and Administration and Can They Be Fixed?

September 27, 2016



MSK Beach Bootcamp
September 21, 2016

Fundamentals of Foreign Trust Administration *Webinar*
June 14, 2016

Real Estate Gift Opportunities: Overcoming Obstacles
June 3, 2016

Conference on Charitable Giving 2016
May 12, 2016

Estate and Gift Tax Returns: Common Mistakes and How to Fix Them
February 11, 2016

Did I Really Miss That? Top 10 Common Mistakes Tax Practitioners Make in Trust and Estate Planning
January 27, 2016

Entertainer & Athlete Loan-Out Corporations
January 26, 2016

A Former IRS Attorney's Perspective on Common Mistakes in Estate and Gift Tax Returns
January 14, 2016

Form 8865: Reporting Foreign Partnership Income and Navigating Rules for Allocable Share of Foreign Income
Webinar
December 1, 2015

Opportunities & Obstacles for Foreign Clients
November 17, 2015

Estate Planning: Looking at Our World Through Income Tax Glasses
October 8, 2015

Opportunities & Obstacles for Foreign Clients
September 22, 2015

To Fee, Or Not To Fee: Entitlement Is The Question
May 21, 2015

Corporate Inversions: Liabilities and Expectations *Webinar*
Spring 2015

Fundamentals of Foreign Trust Administration
March 11, 2015



State Taxation of Income From Foreign Affiliates

March 11, 2015

Engaging Accountants and Tax Attorneys in Multiple Jurisdictions

January 21, 2015

International Tax Forms and Reporting Requirements

January 7, 2015

The California No Contest Clause: Heir Today But Gone Tomorrow,

December 8, 2014

Cross-Border Money Transfers: Key Requirements Every U.S.-Based Nonprofit Needs to Know

November 19, 2014

Fundamentals of Foreign Trust Administration

November 5, 2014

Form 8865: Reporting Foreign Partnership Income

September 23, 2014

Cross-Border Money Transfers: Key Requirements and Pitfalls Every U.S.-Based Nonprofit Needs to Know

September 13, 2014

Bitcoin: Legal Fee or Foe?

August 21, 2014

Pre-Immigration Tax Planning for Foreign Clients

July 7, 2014

International Information Reporting: CFCs, PFICs, FBARs & Beyond

May 29, 2014

State Taxation of Income From Foreign Affiliates

February 12, 2014

Engaging Accountants and Tax Attorneys in Various Jurisdictions

December 10, 2013

Legal Quick Hit: "Your Nonprofit Has Gone Global: Now What Are Your U.S. and Foreign Tax Compliance and Reporting Obligations?"

November 13, 2013

Heir Today, Expectancy Gone Tomorrow

November 12, 2013



Form 8865 - Foreign Partnership Income
November 8, 2013

Introduction to the United States Tax Court
October 2013

Fiduciary Ethics Violations that can lead to Litigation and/or Liability
October 15, 2013

Avoiding the Proverbial Traps for the Unwary
October 2, 2013

Gift Acceptance Policies and Procedures
May 30, 2013

International Programs and Activities: Compliance Issues
May 14, 2013

Making Money: Financial Expert Secrets Revealed
May 6, 2013

Effective Gift Acceptance Policies and Procedures
October 5, 2012

Special Tax Rules that Apply to S Corporations Wishing to Develop Charitable Gifts of S Corporation Assets
September 17, 2012

As Nonprofits Expand Their Global Reach, a Special Focus on Tax, Trademarks and the Foreign Corrupt Practices Act
May 23, 2012

Foreign Account Tax Compliance Act - How Does It Affect NFFEs and Individuals
February 8, 2012

Foreign Tax Reporting: FBARs & Beyond
February 10, 2011

Copyrights and Wrongs
February 7, 2011

Federal Tax Update
November 24, 2010

Fees for Fiduciaries and Their Attorneys
November 19, 2010



The Trustee's Investment Responsibilities under the Prudent Investor Act and the Resulting Damages for Breach of the Trustee's Investment Responsibilities
October 21, 2010

US -European Mergers & Acquisitions Transactions: Overview of US Tax Issues
October 19, 2010

The Facts of Life (Estates): Remainder Interests in Residences and Farms
September 30, 2010

Form 5472 -What Everyone Should Know
June 16, 2010

Important Trustee Obligations to Invest Prudently
June 15, 2010

2010 Entertainment Industry Conference
May 18, 2010

The Facts of Life (Estates)
April 28, 2010

Copyrights and Wrongs
February 22, 2010

Taxation of Foreign Operations -Rules and Planning Opportunities
December 2009

Estate Planning in the Current Environment & Anticipated Changes to the Estate and Gift Tax Laws
September 23, 2009

Taxation of Cross Border Mergers & Acquisitions Transactions
September 10, 2009

Tax Incentives for the 'Green' Industry
2009

Independent Contractor or Not? Getting It Wrong Can Really Hurt!
October 7, 2008

San Gabriel Estate Planning Council
January 23, 2006