

Private Client

Caplin & Drysdale is known for sophisticated tax planning strategies. The firm's well-regarded group of trusts and estates attorneys are strong on complex domestic and international planning. "Everyone I have dealt with at that firm has been top-flight. Not only on the inbound planning for clients but also in expatriation work, which is an extremely complex area of the law." Market Commentator, Chambers HNW

Our private client group counsels individuals and families on domestic and cross-border tax and estate planning issues, including the use of trusts, partnerships, corporations, foundations and wills and the application of tax treaties. We also represent domestic and international clients in disputes with the IRS regarding their income, estate, gift, and generation-skipping transfer tax liabilities. We help individuals with their tax compliance issues, including pre- and post-immigration issues for international clients. We are one of the few firms with a focus on expatriation. Our attorneys draw upon their vast experience both in private practice and in government service to bring a uniquely informed perspective to our representations.

Areas of Focus

Trust and Estate Planning

The design of an estate plan and its implementation is at the core of any estate planning practice. Caplin & Drysdale attorneys know how to listen to clients, how to explain tax consequences in understandable terms, and how to prepare complex wills, trusts, and related documents. We work with high-net-worth individuals and families, both domestic and international, family offices, business owners, and trust and estate fiduciaries. We delight in crafting personalized estate plans to reflect a client's particular values and meet family needs. Caplin & Drysdale Private Client attorneys are regularly recognized as the top professionals for their ability to develop sophisticated, flexible estate plans that can adapt to an ever-changing tax environment. We enjoy working as part of a team with our clients' accountants, financial advisers, and other professionals to ensure proper reporting and seamless implementation of their estate plans. Our goal is to establish long-term relationships with clients, engaging throughout the years to counsel our clients in light of changing personal and legal circumstances.

Business and Succession Planning for Owners of Closely-Held Companies

Often the client's most important asset is a closely-held business. Family businesses, in particular, present many complex issues involving the relationships among family members who work in the business and those who don't, as well as key employees, all of whom have different perspectives, goals and financial pressures. Each family is unique, and we have deep experience in developing strategies within the client's broader estate plan that address many different transitions such as changes in leadership, intergenerational succession planning, liquidity events, and when desirable, exit strategies. The Private Client group helps clients minimize taxes by seeking appropriate valuations of business interests, establishing trusts and entities to facilitate lifetime giving, and reducing the likelihood of disputes by negotiating buy-sell agreements. We work together with our Business, Investment, and Transactional Tax group and with our client's other advisers to advise business owners at all stages.

Pre-Immigration and U.S. Tax Planning for Foreign Individuals

Today's families often span continents and borders. Caplin & Drysdale attorneys have extensive experience advising U.S. nonresident noncitizens on efficient structuring of investments into the U.S., often utilizing corporate entities or trusts, to minimize U.S. estate and income tax exposure. We also advise clients on restructuring their assets prior to a move to the U.S. to minimize future income and estate tax exposure, utilizing strategies including pre-immigration transfers and trusts, recognizing gain, and disposing of assets that create tax inefficiencies. Our team is experienced in analyzing the U.S. tax impacts of foreign trusts, foundations, *Stiftungen*, *usufructs*, and other structures, as well as advising regarding the domestication of such arrangements. We not only advise on and implement such plans, but also guide clients step-by-step through the associated reporting and compliance requirements. The Private Client Group draws on the knowledge of our International Tax colleagues as well as a broad network of advisers in other countries to offer comprehensive advice on cross-border issues.

Expatriation

U.S. citizens who relinquish their citizenship or long-term residents who cease to be lawful permanent residents are deemed to have expatriated for U.S. federal income tax purposes. Unless an exception applies to a specific expatriate or to a specific asset owned by an expatriate, such individuals are treated as having sold all of their assets on the day before expatriation. Moreover, special rules apply to gifts and bequests made by certain expatriates to U.S. beneficiaries. The exceptions to these rules can depend upon or interact with other provisions of the Code or U.S. tax treaties. Caplin & Drysdale attorneys have extensive experience in advising potential expatriates on the application of these rules and their exceptions.

Philanthropic and Planned Giving

Working together with our colleagues in the Exempt Organizations practice, we are uniquely positioned to advise high-net-worth individuals on charitable planning strategies. Whether the client wishes to give during life or at death, we can advise on the most appropriate structure for carrying out the client's objectives. Caplin & Drysdale attorneys have extensive experience creating private foundations, facilitating gifts through donor advised funds or community foundations, incorporating LLCs for charitable giving, and establishing wholly-charitable and split-interest trusts. We are also well versed on the tax issues regarding giving through 501(c)(4) organizations, as well as the tax and governance issues faced by private foundations. We enjoy assisting clients in realizing their charitable legacies.

Ruling Requests on Income, Estate, Gift, and GST Tax Issues

In some circumstances, before undertaking a transaction it is advisable to get the views of the IRS National Office. Building on years of government service and experience, Caplin & Drysdale attorneys frequently represent clients seeking rulings from the IRS. Most frequently the subject matter is related to the generation-skipping transfer tax, typically seeking assurances that modifications to an exempt trust will not alter the trust's inclusion ratio, or seeking leave to make a late retroactive election to apply GST exemption or opt into or out of automatic allocation of GST exemption. We often seek gift, estate, and income tax rulings in these matters as well. We have leveraged our extensive experience getting so-called "9100 relief" for missed GST elections, and used that process to successfully obtain permission to make late QTIP elections, portability elections, section 754 elections, and various late elections related to S corporations.

Audit, Appeals, and Litigation of Income, Estate, and Gift Tax Matters

Caplin & Drysdale attorneys are regularly called upon to advise clients with respect to complex and large-value estate and gift tax controversies, as well as income tax issues for individuals, trusts, and estates. Often it is to the client's advantage to resolve issues with the IRS as early as possible, prior to litigation. We are adept at negotiating advantageous settlements at both the exam and IRS appeals levels. Should litigation become necessary, we assemble an integrated team including Caplin & Drysdale's experienced Tax Disputes attorneys. Representative matters include:

- Defending estate and gift tax valuations of hard-to-value assets such as closely held businesses and artwork;
- Representing international athletes and entertainers with respect to income tax audits of endorsement income;
- Litigating in Tax Court with respect to the availability of an estate tax charitable deduction arising from the disposition of a "decanted" trust;
- Representing non-U.S. citizens before the IRS Office of Appeals regarding income tax residency, including application of complex technical claims relating to use of the "closer connection" exception; and
- Advising clients in the audit, appeal, and litigation of gift and estate tax controversies regarding the income, gift, and estate tax treatment of irrevocable trusts.

Expert Witness on Tax and Trust Issues

Because of our deep knowledge and experience across a wide range of subjects, members of the Private Client group are often hired as expert witnesses on tax, estate planning, and trust matters. Our expertise runs the gamut from domestic and cross-border matters involving different inheritance regimes to estate, gift, and generation-skipping transfer tax and associated areas of income tax and closely-held business planning.

Foreign Account Reporting

As discussed in more detail with respect to our Tax Disputes practice, Caplin & Drysdale attorneys have extensive experience advising clients on the reporting of foreign accounts. We have assisted more than 1,000 clients through the voluntary disclosure process. We have also advised foreign financial institutions on compliance issues.

Probate

Caplin & Drysdale attorneys assist with the probate and revocable trust administration of current clients. We also work on select probate matters for new clients presenting complex and interesting issues, such as estates that would benefit from postmortem planning, probate involving foreign Wills or foreign assets, administration of estates including unreported foreign assets, and the establishment and funding of charitable organizations that will inherit the residue of an estate.

Related Practices

Exempt Organizations

International Tax

Tax Disputes & Tax Litigation

News & Insights

NEWS

Washingtonian Magazine Names Seven Caplin & Drysdale Attorneys to Top Lawyer Lifetime Achievement List
09.01.2022

Caplin & Drysdale Welcomes New Associate Molefi McIntosh
08.02.2022

Chambers High Net Worth Guide Lists Caplin & Drysdale Attorneys as Leaders in Tax and Private Wealth Law Awards & Rankings | 07.18.2022

Beth Kaufman Talks to Tax Notes on Extended Time Period for Estate and Gift Tax Exemption
Tax Notes, 07.11.2022

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ACTEC Trust and Estate Talk Podcast, 05.03.2022

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Beth Kaufman Comments on Preparing Clients for Tax Policy Changes
Financial Planning , 04.03.2022

Tax Notes Quotes Beth Kaufman on Billionaire's Tax and Grantor Trusts
Tax Notes, 04.01.2022

Beth Kaufman Weighs in on Potential Crack Down on Grantor Trusts by Treasury in Tax Notes
Tax Notes, 03.09.2022

Beth Kaufman and Bryson Morgan Comment on Blind Trusts in New York Times
New York Times, 02.05.2022

Law360 Quotes Amanda Leon on FinCEN Regulations
Law360 Tax Authority , 01.28.2022

Tax Notes Quotes Caplin & Drysdale Alert on FinCEN Proposes Rules
Tax Notes, 12.27.2021

Beth Kaufman Comments on IRS Cleaning Out Old Estate Tax Returns in Tax Notes
Tax Notes, 11.19.2021

Beth Kaufman Comments on Estate Planning Under Biden's New Tax Plan in Bloomberg Law
Bloomberg Law, 11.16.2021

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Bloomberg Law, 10.29.2021

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Tax Notes, 10.11.2021

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Tax Notes, 10.04.2021

Beth Kaufman Talks to CNBC on Proposed Tax Changes Impacting Life Insurance
CNBC, 10.03.2021

Beth Kaufman Talks to CNBC on Proposed Changes to Estate Tax
CNBC, 09.29.2021

Tax Notes Quotes Beth Kaufman on Changes to Gift and Estate Tax in Recently Proposed Tax Plan
Tax Notes, 09.20.2021

Beth Kaufman Weights in on Impacts of Possible House Tax Package in CNBC
CNBC, 09.20.2021

Beth Kaufman Talks to Bloomberg on Lower Estate and Gift Tax Exemption in Latest Tax Plan
Bloomberg Law, 09.14.2021

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Awards & Rankings | 08.19.2021

Beth Kaufman Weighs in on Estate Planning Under Biden's New Tax Proposal in Law360
Law360 Tax Authority, 06.10.2021

Bloomberg Quotes Beth Kaufman on Biden's Capital Gains Proposal
Bloomberg Law, 06.09.2021

Victor Jaramillo Talks to The Independent on Tax Concerns for Prince Harry
The Independent, 05.12.2021

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Awards & Rankings | *Super Lawyers*, 04.29.2021

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Bloomberg Law, 04.27.2021

Caplin & Drysdale Welcomes Meghan Muncey
04.12.2021

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Administration
ACTEC Trust and Estate Talk Podcast, 03.30.2021

Beth Kaufman Weighs in on Possible Changes to Valuation Discounts in Bloomberg Law
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Tax Notes, 01.14.2021

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Beth Kaufman Talks to Tax Notes About Grantor Trusts and GRATs
Tax Notes International, 11.23.2020

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Wall Street Journal, 11.13.2020

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Who's Who Legal Names Anne O'Brien as Global Leader in Private Client Awards & Rankings | 09.01.2020

Caplin & Drysdale Earns Top Ranking in 2021 "Best Lawyers in America" Awards & Rankings | *U.S. News & World Report*, 08.20.2020

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Tax Notes, 04.21.2020

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Tax Notes Quotes Beth Kaufman on Opportunity Zone Regs
Tax Notes, 01.24.2020

Beth Kaufman Comments on Her Time at Treasury in Tax Notes
Tax Notes, 12.16.2019

Beth Kaufman and Anne O'Brien Named Best Financial Advisers in Washingtonian Magazine Awards & Rankings | *The Washingtonian Magazine*, 12.04.2019

Tax Notes Quotes Beth Kaufman on Proposed IRS Rule Concerning Retained Interests
Tax Notes, 12.02.2019

Beth Kaufman Elected Into the NAEPC Estate Planning Hall of Fame®
National Association of Estate Planners & Councils (NAEPC), 11.14.2019

Beth Kaufman Comments on Wealth Tax Plans
Dow Jones Newswires, 11.07.2019

Caplin & Drysdale Earns Top-Tier "Best Law Firms" Rankings in 10th Edition of U.S. News – Best Lawyers Awards & Rankings | *U.S. News & World Report*, 11.01.2019

Tax Notes Quotes Beth Kaufman on Wealth Tax
Tax Notes, 10.04.2019

Caplin & Drysdale Announces the Election of Four New Members
10.01.2019

Victor Jaramillo Comments on Repatriation Tax in Bloomberg
Bloomberg Law, 09.30.2019

Caplin & Drysdale Welcomes Jonathan Black, George O'Connor, and Sarah Racicot
09.25.2019

Bloomberg Talks to Beth Kaufman on Tax Policy
Bloomberg Law, 09.25.2019

Tax Notes Quotes Beth Kaufman on Assessing Assets
Tax Notes, 09.25.2019

Beth Kaufman Comments on Assets in Trusts in WSJ
The Wall Street Journal, 09.25.2019

POLITICO Talks to Beth Kaufman on Wealth Tax
POLITICOPRO, 09.25.2019

Beth Kaufman Comments on System to Evaluate Assets in Law360
Law360 Tax Authority, 09.24.2019

Alison Egan and Megan Wernke Accepted into the Mid-Atlantic Fellows Institute of the American College of
Trust and Estate Counsel
09.11.2019

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Tax Notes, 07.23.2019

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Caplin & Drysdale, Chartered, 03.18.2019

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The New York Times, 02.19.2019

Beth Kaufman Comments on Bernie Sanders' Estate Tax Proposal
Bloomberg Law, Daily Tax Report, 02.05.2019

CNN Talks to Beth Kaufman on Sanders' Tax Plan Targeting Estates of Ultra Rich
CNN, 01.31.2019

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ACTEC Trust and Estate Talk Podcast, 01.18.2019

Beth Kaufman Comments on the Year Ahead in Estate Tax Planning
Tax Notes, 12.31.2018

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ACTEC Trust and Estate Talk Podcast, 12.18.2018

CBS News Quotes Victor Jaramillo on Writing Off Bitcoin Losses
CBS News MoneyWatch, 12.14.2018

Beth Kaufman Named Accredited Estate Planner® (Distinguished) Nominee by NAEPC
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CBS News Quotes Beth Kaufman on Potential Revelations in President Trump's Tax Return
CBS News' MoneyWatch, 11.09.2018

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Awards & Rankings | *U.S. News & World Report*, 11.01.2018

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ABC News, 10.29.2018

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Bloomberg, 10.19.2018

Business Insider Interviews Beth Kaufman on Possible Roadblocks Facing Investigators in Trump Tax
Allegations
The Business Insider, 10.05.2018

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Associated Press Quotes Beth Kaufman and Mark Matthews: Probes of Trump Taxes Carry Potential for Millions
in Fines
The Associated Press, 10.04.2018

Accounting Today Quotes Beth Kaufman and Anne O'Brien on IRS Chief Rettig's Potential Response to Trump
Tax Investigation
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Caplin & Drysdale's Newest Member Victor Jaramillo Serves Tax Controversy Needs of Global Community
Caplin & Drysdale, 10.03.2018

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POLITICO Pro, 10.03.2018

CBS Evening News Interviews Beth Kaufman on Trump Tax Investigation
CBS Evening News, 10.02.2018

Forbes Quotes Beth Kaufman on Maryland Estate Tax Changes
Forbes, 08.31.2018

Caplin & Drysdale Improves Ranking in 2019 "Best Lawyers in America"
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Caplin & Drysdale Attorneys Advance in Chambers Ranking for Private Wealth Law
Awards & Rankings | *Chambers High Net Worth Guide*, 07.23.2018

Victor Jaramillo Comments on IRS Penalty Cap with Law360
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ACTEC Trust and Estate Talk Podcast, 07.11.2018

Beth Kaufman Talks to Tax Notes on Tailoring Estate Planning Techniques to Client Needs
Tax Notes, 06.26.2018

Beth Kaufman Discusses Tailoring Estate Planning Techniques to Client Needs
Tax Analysts, 06.25.2018

Beth Kaufman Comments on Marvel Legend Stan Lee's Elder Abuse Controversy
InvestmentNews, 06.15.2018

Victor Jaramillo Talks to Law360 on Latin American and Foreign Tax Credits
Law360, 06.05.2018

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InvestmentNews, 05.31.2018

Niles Elber and Victor Jaramillo Talk to Law360 on Offshore Voluntary Disclosure Program Ending
Law360, 05.14.2018

PODCAST: Beth Kaufman Discusses New Tax Act and the Estate Planning Opportunities It Presents
ACTEC Trust and Estate Talk Podcast, 05.08.2018

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04.23.2018

Beth Kaufman Discusses Inadvertent GST Exemption Exclusions with Tax Notes
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CNN Money, 01.09.2018

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Caplin & Drysdale, Chartered, 01.01.2018

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MEDIA ADVISORY: Will the IRS Know What Gifts Prince Harry Gives Meghan Markle for Christmas?
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Stafford Smiley Comments on Changes to the Estate Tax in the House Tax Bill
Tax Notes, 11.20.2017

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Law360, 11.16.2017

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The New York Times, 07.21.2017

WSJ Quotes Jonathan Brenner: Hedge-Fund Managers Prepare Huge Tax Checks
The Wall Street Journal, 07.20.2017

Beth Kaufman Talks to Washington Post on Reduced Enforcement of Estate and Gift Taxes
The Washington Post, 07.11.2017

Beth Shapiro Kaufman Comments on Gift Taxes
ProPublica and The Real Deal, 07.05.2017

Caplin & Drysdale Names Victor Jaramillo Of Counsel to the Firm

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WSJ Quotes Beth Shapiro Kaufman: Many Estate-Tax Payers Just Got a Reprieve from the IRS

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Washington Post Speaks to Beth Shapiro Kaufman on the Wealthy Delaying Tax Payments

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Beth Kaufman Speaks to Investment News on Possible Estate Tax Repeal

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Beth Kaufman Speaks with Executive Leaders Radio on Her Role as Caplin & Drysdale President

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Awards & Rankings | *Business Edition of Best Lawyers*, 06.21.2016

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The Wall Street Journal Quotes Beth Kaufman on Tax-Smart Philanthropy Made Easy

The Wall Street Journal, 08.22.2014

Caplin & Drysdale Lawyers Earn Best Lawyers Ranking
Awards & Rankings | 08.21.2014

Guide to World's Leading Women in Business Law Lists Caplin & Drysdale Lawyers
Awards & Rankings | *Expert Guides*, 07.29.2014

With Its Founders, Caplin & Drysdale Celebrates 50 Years of Excellence
Press Releases | *Caplin & Drysdale*, 07.23.2014

Clients and Peers Recommend Caplin & Drysdale in 2014 Legal 500 Ranking
Awards & Rankings | *The Legal 500*, 07.01.2014

Global Law Experts Award Caplin & Drysdale 2014 International Private Client Law Firm of the Year in
Washington, D.C.
Awards & Rankings | *Global Law Experts*, 06.09.2014

Women in Business Law Honor Beth Kaufman as a Leading Practitioner in Estate Planning
Awards & Rankings | *Women in Business Law*, 06.09.2014

Caplin & Drysdale Earns Top Honors in 2014 Chambers USA
Awards & Rankings | *Chambers USA*, 05.28.2014

The Washington Post Lists Caplin & Drysdale Attorneys Among the Top Attorneys in D.C.
Awards & Rankings | *The Washington Post*, 04.30.2014

Tax Notes Today Quotes Kirsten Burmester: Toward a Solution to the PFIC Problem
Tax Notes Today, 04.14.2014

Bloomberg Quotes Beth Kaufman on Proposed Estate and Gift Tax Changes
Bloomberg BNA's Daily Tax Report, 03.05.2014

Caplin & Drysdale Strengthens Global Tax and Litigation Services
Press Releases | 01.08.2014

Washingtonian Recognizes Caplin & Drysdale Attorneys Among Washington's Best Lawyers
Awards & Rankings | *Washingtonian Magazine*, 12.03.2013

Daily Tax Report Quotes Beth Kaufman on GST Exemption
Bloomberg BNA's Daily Tax Report, 12.02.2013

Caplin & Drysdale Lawyers Listed in World's Leading Women in Business Law
Awards & Rankings | *Expert Guides*, 11.08.2013

The Wall Street Journal Quotes Beth Kaufman on States with Highest Death Taxes
The Wall Street Journal, 10.25.2013

19 Caplin & Drysdale Attorneys Achieve Best Lawyers in America Ranking
Awards & Rankings | *U.S. News & World Report*, 10.21.2013

Caplin & Drysdale Enhances Tax Practice with Three Lateral Hires
Press Releases | 10.01.2013

WSJ Quotes Beth Kaufman on Planning for Higher Tax Rates on Top Earners
The Wall Street Journal, 09.06.2013

Beth Kaufman Comments on Obama FY 2014 Estate Tax Proposals

Bloomberg BNA Daily Tax Report, 07.15.2013

Tax Notes Quotes Beth Kaufman on the Estate Planning Implications of the DOMA Ruling

Tax Notes, 06.27.2013

Beth Kaufman Comments on DOMA Ruling and Extension of Benefits to Gay Married Couples

Bloomberg BNA Daily Tax Report, 06.27.2013

Beth Kaufman Comments on Ex-Pistons Owner's \$2 Billion Tax Dispute

Detroit Free Press, 06.21.2013

Scott Michel and Michael Pfeifer Selected for Legal Tax Advisory Board

06.10.2013

14 Caplin & Drysdale Attorneys Recognized in Chambers USA 2013

Awards & Rankings | *Chambers USA*, 05.29.2013

Wealthy Americans Target of New IRS Initiative

Caplin & Drysdale, 05.07.2013

Super Lawyers Lists Nineteen Caplin & Drysdale Attorneys

Awards & Rankings | *Super Lawyers*, 04.29.2013

Beth Kaufman Comments on Future of Estate Tax with Daily Tax Report

Daily Tax Report, 03.28.2013

Caplin & Drysdale Attorneys Recognized by Peers in Best Lawyers in America

Awards & Rankings | 03.18.2013

Caplin & Drysdale Lawyers Alert International Athletes to Beware Endorsement Tax Issues

Press Releases | 03.18.2013

Beth Kaufman Quoted by The Fiscal Times on Little Known Tax Breaks

The Fiscal Times, 02.01.2013

Beth Shapiro Kaufman Quoted in Bloomberg BNA, Fiscal Cliff Unified Estate, Gift Tax Exemptions Seen as Windfall by Advisers

Bloomberg BNA, 01.03.2013

Beth Kaufman Discusses Estate Tax Rate Extension with the Daily Tax Report

BNA Daily Tax Report, 11.21.2012

U.S. News Recognizes Caplin & Drysdale With Top Ranking

Awards & Rankings | 11.08.2012

Beth Kaufman Quoted in BNA's Daily Tax Report on Year-End Charitable Contributions

Daily Tax Report, 10.26.2012

Beth Kaufman Quoted in The Wall Street Journal, The Gift That Keeps Giving

The Wall Street Journal, 08.17.2012

Scott Michel Comments on New IRS Voluntary Disclosure Guidance

Tax Notes, 07.02.2012

Scott Michel Comments on New Voluntary Disclosure Guidance From the IRS
Reuters, 06.29.2012

Scott Michel Quoted in Tax Notes, IRS Revising FAQ for Offshore Voluntary Disclosure Program
Tax Analysts, 06.25.2012

Scott Michel Quoted in Reuters, U.S. in Tax Crackdown Pact With Swiss, Japanese
Reuters, 06.21.2012

Scott Michel Quoted on CNBC, Tax Shelters: Why Israel Could Be the Next Switzerland
CNBC, 06.19.2012

Chambers and Legal 500 Recognize Caplin & Drysdale in 2012 Top Rankings
Both | *Chambers USA / The Legal 500*, 06.12.2012

Beth Kaufman Quoted in The Wall Street Journal, Invasion of the Charity Snatchers
The Wall Street Journal, 06.08.2012

Beth Kaufman Quoted in Tax Analysts, New Obama Budget Proposal Targets Popular Estate Planning
Technique
Tax Analysts, 02.15.2012

The Washingtonian Lists Eight Caplin & Drysdale Attorneys as Top Lawyers in Washington
Awards & Rankings | *Washingtonian Magazine*, 12.30.2011

David Rosenbloom Quoted in The New York Times, Law to Find Tax Evaders Denounced
The New York Times, 12.26.2011

Beth Kaufman Quoted in The Wall Street Journal, Good News for Gift Givers
The Wall Street Journal, 11.29.2011

Beth Kaufman Quoted in The Wall Street Journal, IRS Clarifies Estate Rules
The Wall Street Journal, 10.08.2011

Beth Kaufman Quoted in Reuters, How to Claim Unclaimed Money Without Getting Scammed
Reuters, 10.07.2011

Beth Kaufman Comments on Estate Carryover Election
BNA, 09.22.2011

The Best Lawyers in America Ranks 19 Caplin & Drysdale Attorneys as Leaders in Their Field
Awards & Rankings | *U.S. News & World Report*, 09.01.2011

Beth Kaufman Quoted in Dow Jones, Estate Tax Fog Settles In
Dow Jones, 08.09.2011

Beth Shapiro Kaufman Quoted in The Fiscal Times Article, Red Flags: IRS Taking a Tougher Look at Tax
Deductions
The Fiscal Times, 07.22.2011

Chambers and Legal 500 Recognize Caplin & Drysdale in 2011 Top Rankings
Both | *Chambers USA / The Legal 500*, 06.16.2011

Scott Michel & Beth Shapiro Kaufman Comment in the Wall Street Journal, The Tax Blog
The Wall Street Journal, 06.01.2011

Beth Shapiro Kaufman Comments in Wall Street Journal Article, IRS Scrutinizes Gifts of Real Estate
The Wall Street Journal, 05.26.2011

Beth Kaufman Responds to Obama's Estate Plan Proposal
The Wall Street Journal, *BNA Daily Tax Report*, 03.05.2011

Caplin & Drysdale Attorneys Comment on WikiLeaks' Release of Offshore Account Data
The Wall Street Journal, *World Radio Switzerland*, *The New York Times*, *Marketplace*, 02.03.2011

Beth Kaufman Speaks on Recent Developments in Trusts and Estates at the 2011 Heckerling Conference
Trusts and Estates, 02.03.2011

Beth Kaufman Comments on the Latest Developments About the Estate-Tax Provision
The Wall Street Journal, *BNA Daily Tax Report*, 12.17.2010

CNBC Interviews Beth Kaufman on the Estate Tax Repeal
CNBC, 11.12.2010

Beth Kaufman Selected as One of the Best Estate Planning Attorneys in the Washington Area
Awards & Rankings | *Washingtonian Magazine*, 11.01.2010

Beth Kaufman Discusses Implications of the Estate Tax Repeal
Forbes, *Dow Jones*, *Wisconsin Law Journal*, *USA Today*, 10.20.2010

Beth Kaufman States Generation-Skipping Transfer Tax Is More Troublesome in 2010 Than Estate Tax
Tax Notes, 10.04.2010

Beth Kaufman Comments on Shielding Estates Through Prenuptial Agreements
Dow Jones, 10.01.2010

David Rosenbloom Comments on Undeclared Offshore Banking's Shift to the East
09.24.2010

Caplin & Drysdale Recognized in 2011-2012 U.S. News-Best Law Firms Ranking
U.S. News & World Report, 09.15.2010

19 Caplin & Drysdale Attorneys Named Best Lawyers in America
Awards & Rankings | *U.S. News & World Report*, 08.04.2010

Beth Kaufman Applauds IRS for Granting Extensions to Make QTIP Election
Tax Analysts, 07.23.2010

Chambers USA and Legal 500 Recognize Caplin & Drysdale in 2010 Top Rankings
Both | *Chambers USA / The Legal 500*, 06.15.2010

Beth Kaufman Comments about the Latest Developments in the Estate Tax Debate
The Wall Street Journal, 04.22.2010

Retroactive Law Could Be Estate Tax Remedy
CQ Today Print Edition, 12.10.2009

Beth Kaufman Comments about Judge's Appointment of Executors for Jackson Estate
Reuters, 11.11.2009

Washingtonian Magazine Lists Six Caplin & Drysdale Attorneys as Top Lawyers in Washington
Awards & Rankings | *Washingtonian Magazine*, 11.01.2009

Movie Deal Could Strengthen Hold on Jackson Estate
Reuters, 07.22.2009

When There Is a Will, Things Are More Likely to Go Your Way
Chicago Tribune, 07.19.2009

All the Right Moves
The Baltimore Sun, 07.12.2009

Jackson Will Hits All the Right Notes
InvestmentNews, 07.12.2009

Caplin & Drysdale's Beth Kaufman Discusses Legal Issues of Michael Jackson's Estate
Associated Press, 07.01.2009

VIDEO: Michael Jackson Estate Analysis by Caplin & Drysdale's Beth Kaufman
Fox 5 News, 06.29.2009

Super Lawyers Recognizes Nine Caplin & Drysdale Attorneys in Five Practice Areas
Awards & Rankings | *Super Lawyers*, 03.27.2009

EVENTS

Beth Kaufman Explores the Regulatory Process at ACTEC Mid-Atlantic Regional Meeting
The Willard InterContinental Hotel, Washington, DC, 09.17.2022

Beth Kaufman Discusses Generation-Skipping Transfer Tax Exemption at Mid-Atlantic Fellows Institute
09.15.2022

Anne O'Brien Analyzes Key Tax and Organizational Challenges for Closely Held Businesses at Mid-Atlantic
Fellows Institute
09.15.2022

Beth Kaufman Discusses Estate and Gift Tax at D.C. Bar Taxation Community's Tax Legislative and Regulatory
Update Conference
Remote, 05.04.2022

Beth Kaufman Explores Hot Topic in Trusts and Estates at ACTEC Meeting
03.13.2022

Beth Kaufman Discusses Estate Planning at Houston Estate and Financial Forum
02.25.2022

Beth Kaufman Explores Lifetime Gifts and Reporting at New England Fellows Institute
02.11.2022

Victor Jaramillo Addresses Expatriation at U.S. and UK Tax and Estate Planning Conference
10:00 AM EST
11.24.2021

Megan Wernke Discusses GTS at Annual Family Office Tax Seminar
12:00 PM - 1:00 PM
11.18.2021

Beth Kaufman Explores the Latest Development Regarding Tax Legislation at PGRT

8:30 AM – 9:30 AM

11.18.2021

Beth Kaufman and Megan Wernke Provide a Tax Update at MACPA 2021 Advanced Tax Institute

8:30 AM

11.09.2021

Beth Kaufman Analyzes Recent Proposed Changes Affecting Estate Planning on ABA Webinar

1:00 PM

11.04.2021

Beth Kaufman Addresses Federal Legislation Impacting the T&E World on Chicago Estate Planning Council Webinar

12:00 PM - 1:30 PM

10.21.2021

Beth Kaufman Shares Inside Beltway View of Estate Planning at Duke University Estate Planning Conference

8:10 AM - 9:15 AM

10.20.2021

Beth Kaufman Addresses Recent Tax Law Changes at Mid-Atlantic Fellows Institute

09.30.2021

Beth Kaufman Explores Generation-Skipping Transfer Tax Exemption at Mid-Atlantic Fellows Institute

09.30.2021

Beth Kaufman Analyzes Gift Tax and Audits at NCBA Annual Estate Planning & Fiduciary Law Program

10:35 AM

07.23.2021

Beth Kaufman Analyzes Estate Planning Under New Biden Administration on Replay of ACTEC Webinar

1:00 PM - 2:30 PM ET

02.23.2021

Beth Kaufman Analyzes Estate Planning Under New Biden Administration on ACTEC Webinar

02.04.2021

Beth Kaufman Explores Expected Changes Under New Biden Administration at D.C. Estate Planning Council Event

5:00 PM to 6:30 PM

01.21.2021

Beth Kaufman Analyzes Charitable Giving and Estate Planning at D.C. Bar Tax Legislative and Regulatory Update Conference

9:00 AM to 10:25 AM

01.13.2021

Beth Kaufman Explores the Impact of the 2020 Election on Estate Planning at ACTEC Meeting

12.01.2020

Beth Kaufman Analyzes Impact of 2020 Election on Estate Planning on ABA Webinar

1:00 PM

11.17.2020

Beth Kaufman and Megan Wernke Explore Recent Developments in Federal Estate and Gift Tax Law at Maryland Advanced Tax Institute

11.10.2020

Beth Kaufman Analyzes Campaign Tax Proposals at Duke University Virtual Estate Planning Conference

10.07.2020

Beth Kaufman Discusses Gift Tax Returns on Peak Trust Webinar

12:00 PM

09.24.2020

Amanda Leon Explores Transfer Pricing Litigation on ABA Virtual 2020 May Tax Meeting

1:00 PM - 2:30 PM

07.02.2020

Beth Kaufman Discusses Settlement of Estate and Gift Tax Cases at EPC of Montgomery County Event

12:00 PM - 1:30 PM

03.12.2020

Beth Kaufman Discusses Taxation at Harvard Kennedy School

02.29.2020

Beth Kaufman Analyzes Estate Planning at D.C. Bar Tax Legislative and Regulatory Update Conference

11:00 AM to 12:15 AM

01.23.2020

Beth Kaufman Explores Capital and Wealth Taxation at National Tax Association Annual Conference

1:45 PM to 3:15 PM

11.21.2019

Meghan Biss Discusses Tax Exempts Developments at AICPA National Tax Conference

3:45 PM - 4:35 PM

11.13.2019

Beth Kaufman and Megan Wernke Explore Recent Developments in Estate Planning at Maryland Advanced Tax Institute

10:15 AM

11.12.2019

Beth Kaufman Explores Value Added Estate Planning at MSBA Estate & Trust Law Section Meeting

11:45 AM to 1:00 PM

10.17.2019

Beth Kaufman to Speak on Taxing Wealth Hosted by The Tax Policy Center

09.24.2019

Beth Kaufman Explores Tax Controversies at ACTEC Mid-Atlantic Regional Meeting

09.15.2019

Anne O'Brien Presents at Inaugural Mid-Atlantic Fellows Institute
New York, NY, 09.12.2019

Megan Wernke Addressess Recent Supreme Court Cases at Representing Estate and Trust Beneficiaries and
Fiduciaries Conference
10:15 AM
07.18.2019

Beth Kaufman and Megan Wernke Address Tax Reform at AiP Conference on Philanthropy
10:50 AM
05.23.2019

Beth Kaufman Discusses Estate Planning Reflecting the Clients' Values at Queens University of Charlotte Estate
Planners Day
1:45 PM to 2:40 PM ET
05.16.2019

Beth Kaufman Teaches Generation-Skipping Transfer Tax at Florida Fellows Institute
04.11.2019

Megan Wernke Explores Recent Tax Developments at D.C. Bar Series
12:00 PM to 1:30 PM
11.15.2018

Beth Kaufman and Megan Wernke Discuss Recent Federal Tax Developments at MACPA 2018 Advanced Tax
Institute Conference
10:15 AM
11.13.2018

Kirsten Burmester Examines Nonresident Tax Compliance at MACPA 2018 Advanced Tax Institute Conference
2:45 PM
11.12.2018

Beth Kaufman Discusses Late Elections Under Section 9100 at NAEPC Advanced Estate Planning Strategies
Conference
11.08.2018

Beth Kaufman Moderates Panel on Washington Insiders at ACTEC 2018 Fall Meeting
10.26.2018

Beth Kaufman Addresses Recent Developments in Estate Planning at Duke University Estate Planning
Conference
8:30 AM - 9:30 AM
10.11.2018

Beth Kaufman Explores Estate Planning Strategies Before 2026 at Duke University Estate Planning Conference
9:40 AM to 10:40 AM
10.11.2018

William Fournier Explores Shared Services on ACC Nonprofit Organizations Call
3:00 PM
09.11.2018

Kirsten Burmester Discusses Nonresident Tax Compliance on Strafford Webinar

1:00 PM - 2:30 PM EDT

08.07.2018

Beth Kaufman Discusses Advising Clients After the 2017 Tax Act at ALI CLE Estate Planning in Depth 2018 Conference

8:05 AM

06.25.2018

William Fournier Discusses Employee Sharing at TEGE Exempt Organizations Council Program

06.15.2018

Beth Kaufman Explores Hot Tax Topics at Texas Bar Advanced Estate Planning Strategies Conference

04.12.2018

Beth Kaufman Discusses 9100 Relief at Annual ACTEC Meeting

03.09.2018

Victor Jaramillo Discusses U.S. Tax Reform at International Tax Commission of the Mexican Institute of Public Accountants

02.14.2018

Victor Jaramillo Examines U.S. Tax Reform at COPARMEX Queretaro

02.13.2018

Beth Kaufman, Kirsten Burmester, and Megan Wernke Discuss Estate Planning Under New Tax Law on STEP Webinar

12:00 PM to 1:45 PM EST

01.31.2018

Beth Kaufman Confronts the Challenges of Tax Reform at ACTEC ALI-CLE Teleconference

01.11.2018

Kirsten Burmester Discusses Avoiding Foreign Trust Throwback Tax at Strafford Webinar

1:00 PM ET to 2:00 PM ET

11.28.2017

Beth Kaufman and Megan Wernke Examine Estate Planning Issues at Advanced Tax Institute

8:30 AM - 4:40 PM

11.14.2017

Megan Wernke Explores Basics of Fiduciary Income Taxation at Montgomery County Estate Planning Council

8:30 AM - 9:30 AM

11.01.2017

Beth Kaufman Explores Generation-Skipping Transfer Tax at Southern Federal Tax Institute

11:00 AM to 12:00 PM

10.27.2017

Beth Kaufman Discusses Ethical Challenges in Trusts and Estates at Duke University Estate Planning Conference

2:10 PM to 3:10 PM

10.13.2017

Kirsten Burmester Explores Expatriation Planning for the Global Citizen at AICPA Webinar

1:00 PM ET to 2:00 PM ET

09.28.2017

Jonathan Brenner to Lecture at University of Melbourne on U.S. Income Taxation

July 26th through August 1st

07.26.2017

Victor Jaramillo Discusses Developments in Tax Administrations and Their Approach to Tax Controversy Compliance

2:00 PM - 3:30 PM

06.15.2017

Kirsten Burmester to Speak on Mastering Form 5472 Webinar Panel

1:00 PM - 2:50 PM ET

05.24.2017

Beth Kaufman to Speak at Bloomberg BNA Estates, Gifts and Trusts Luncheon

12:30 PM

05.03.2017

Beth Kaufman to Speak at 46th Annual Estate Planning Seminar

01.20.2017

Arianna Caldwell to Moderate Panel on Subpart F Tax at ABA Tax Section 2017 Midyear Meeting

4:00 PM - 5:00 PM

01.19.2017

Beth Kaufman and William Fournier to Speak at MACPA 2016 Advanced Tax Institute

11.15.2016

Beth Kaufman to Speak at 11th Annual Delaware Trust Conference

10.25.2016

Beth Kaufman to Speak at ACTEC 2016 Fall Meeting

10.22.2016

Beth Kaufman to Speak on Common GST Problems at D.C. Bar Series on Estate Planning

12:00 PM to 2:00 PM

10.18.2016

Beth Kaufman to Speak on Charitable Giving at AJC Lunch

10.06.2016

Beth Kaufman to Speak on Common GST Problems at Denver Estate Planning Council Breakfast

09.29.2016

Beth Kaufman to Speak at ACTEC Mid-Atlantic Regional Meeting
09.18.2016

William Fournier to Speak at ABA Business Law Section Annual Meeting
09.09.2016

Beth Kaufman to Speak on 100th Anniversary of the Federal Estate Tax at American Law Institute Video
Webcast
1:30 pm
05.11.2016

Beth Kaufman to Speak on Estate Planning at IMCA 2016 Investment Consultants Conference
02.01.2016

Beth Kaufman and Megan Wernke to Speak at the 2015 Advanced Tax Institute
11.03.2015

Beth Kaufman to Speak on Recent Developments in Federal Case, Regulations, and Delaware Trust Law
10.26.2015

Beth Kaufman to Speak at Annual Delaware Trust Conference
10.26.2015

Beth Kaufman to Speak on the Future of Estate Planning at B'nai B'rith International
10.21.2015

Kirsten Burmester to Speak on Mastering Form 3520 Webinar Panel
07.16.2015

Beth Kaufman to Speak at Baker Tilly Trust and Estate Conference
06.24.2015

Megan Wernke to Speak on The Changing Landscape of Estate Planning
04.16.2015

Beth Kaufman to Speak at ACTEC's 2015 Annual Meeting
03.08.2015

David Rosenbloom and Victor Jaramillo to Speak at the University of Geneva
02.02.2015

Beth Kaufman to Present Keynote Speech at 21st Annual Estate Law Institute
11.20.2014

Beth Kaufman to Present Creative Strategies for Using Lifetime QTIPS
10.22.2014

Beth Kaufman to Speak at Estate Planning Council Breakfast
10.21.2014

William Fournier to Speak on Form 990 and Other IRS Reporting Issues
10.01.2014

Beth Kaufman to Speak at ACTEC Mid-Atlantic Meeting
09.14.2014

Beth Kaufman to Speak at San Francisco Estate Planning Council
03.19.2014

Beth Kaufman to Speak on ABA Estate and Gift Tax Committee Conference Call
11.21.2013

Beth Kaufman to Speak at the Advanced Tax Institute
11.19.2013

Stafford Smiley to Speak at Moscow State Law Academy
10.25.2013

Stafford Smiley Speaks On Tax Reform at the Russian IFA
10.23.2013

Stafford Smiley to Speak at the 2nd Annual Conference of the Moscow State Institute for Law
10.17.2013

Beth Kaufman to Speak at ACTEC Mid-Atlantic Meeting
10.04.2013

Stafford Smiley to Speak at American Chamber of Commerce in Poland
09.20.2013

Beth Kaufman Speaks at ABA 24th Annual Spring CLE Symposia
05.03.2013

Beth Kaufman to Present Webinar on Estate Planning After the American Taxpayer Relief Act
04.11.2013

Beth Kaufman to Speak at Webcast for ALAS Members
04.04.2013

Beth Kaufman to Speak at Family Office Exchange Program
01.30.2013

Beth Kaufman to Speak at ACTEC Seminar
01.25.2013

Beth Kaufman to Participate in Q&A Panel at Heckerling Institute
01.16.2013

Beth Kaufman to Speak at the 47th Annual Heckerling Institute on Estate Planning
01.14.2013

Beth Kaufman to Speak at ACTEC Program
12.13.2012

Beth Kaufman to Discuss Estate Planning at Planned Giving Roundtable
12.12.2012

Niles Elber, Matthew Hicks, and Michael Pfeifer to Present Program to Mid-Atlantic STEP Members
12.03.2012

Beth Kaufman to Speak at D.C. Bar Event on Estate Tax
11.20.2012



Beth Kaufman to Speak at ACTEC's 2012 Fall Meeting Professional Program
10.19.2012

Beth Kaufman to Speak at 2012 Delaware Trust Conference
10.02.2012

Beth Kaufman to Speak at STEP's Estate & Gift Taxes: Planning for Uncertainty in the Year of the Dragon
09.27.2012

Beth Kaufman to Speak at Solomon and Sylvia Bronstein Seminar for Professionals 2012
09.06.2012

Estate and Tax Planning for Wealthy Widows and Widowers
01.27.2012

The U.S. Expatriation Tax
01.25.2012

Beth Kaufman to Discuss GST Tax at Heckerling Conference
01.12.2012

Beth Kaufman Speaks at the Heckerling Institute on Estate Planning
01.11.2012

Beth Kaufman to Discuss Estate Planning Basics at AICPA National Tax Conference
11.07.2011

International Bar Association Annual Conference
10.30.2011

The Nuts and Bolts of Expatriation – What Is the Process?
10.18.2011

Beth Kaufman to Speak on Tax Reporting for 2010 Decedents
09.21.2011

Beth Kaufman to Discuss Exemptions at Estate Planning Council Program
09.20.2011

Beth Kaufman to Speak at New York Philanthropic Planning Symposium 2011
05.26.2011

Beth Kaufman to Discuss Estate Planning at National Tax Association Spring Symposium
05.19.2011

Beth Kaufman to Speak at 2011 Spring Symposia
04.28.2011

Beth Kaufman to Discuss Impact of 2010 Tax Act
01.28.2011

Beth Kaufman to Participate in Estate Tax Panel
12.22.2010

Beth Kaufman to Discuss Estate Planning Hot Topics
10.15.2010

Beth Kaufman to Discuss 2010 Estate Planning Opportunities
09.29.2010

13th Annual Advanced ALI-ABA Course of Study for Counselors to Foreign and U.S. Clients
American Law Institute - American Bar Association
08.19.2010

Beth Kaufman to Discuss Estate Tax Legislative Update
05.06.2010

Beth Kaufman to Discuss Upcoming Estate Tax Legislation
02.22.2010

Beth Kaufman to Discuss Tax Planning Proposals for a New Era
01.14.2010

Beth Kaufman to Participate in Planned Giving Roundtable
12.08.2009

School of Law 2009 Procopio International Tax Institute
University of San Diego School of Law
10.19.2009

Beth Kaufman to Discuss Failure to Allocate GST at Duke Conference
10.15.2009

Latest International Tax Developments and News from Washington, D.C.
Society of Trust & Estate Practitioners (STEP) Miami
09.23.2009

21st Annual International Trust & Tax Planning Summit
International Trust & Tax Planning Summit
09.23.2009

The Current State of Expatriation
PLI: International Tax & Estate Planning 2008
New York, NY, 06.03.2008

Taxation of Artists and Sportsmen
University of Geneva, Faculty of Law
Geneva, 10.11.2007

PUBLICATIONS

Information Reporting Arbitrage: The New American Way
Article | *IFC*, 03.09.2022

Ready or Not, It's Time for Transparency *FinCEN Proposes Rules to Implement Beneficial Ownership Reporting Requirements*
International Tax Alert | 12.17.2021

IRS to "Campaign" into Puerto Rico; How can Taxpayers Defend?
Tax Alert | 02.03.2021

2021 Ushers in Decreased D.C. Estate Tax Exemption, Potential Additional Probate and Estate Tax Legislation
Private Client Alert | 01.05.2021

The IRS Resumes its Global High-Wealth Examination Program and Targets High Income Non-Filers
Tax Alert | 07.22.2020

Challenge to the Constitutionality of the ACA Raises NII Tax Refund Possibility
Tax Alert | 07.06.2020

GST Exemption Allocation for 2019, Better Late than Timely
Article | *Steve Leimberg's Estate Planning Email Newsletter*, 05.20.2020

Timely Estate Planning Techniques, Including "May Day" GRATs
Private Client Alert | 04.30.2020

"May Day" GRATs: An Excellent Estate Planning Opportunity
Private Client Alert | 04.30.2020

Damage Mitigation: The IRS Helps Alleviate Effect of COVID-19 on U.S. and Foreign Residency
Tax Alert | 04.22.2020

Estate and Gift Tax Return Due Dates Not Postponed
Private Client Alert | 03.27.2020

UPDATE: Gift Tax Return Due Date Now July 15, 2020
Private Client Alert | 03.27.2020

Congress Takes the Stretch Out of IRAs (and Other Retirement Assets)
Private Client Alert | 01.06.2020

Supreme Court Rules Against North Carolina in *Kaestner* On State Income Taxation of Trusts: What Does This Mean for the District of Columbia, Virginia, and Maryland?
Private Client Alert | 06.26.2019

Tax Problems Loom in the College Admissions Scandal
Tax Alert | 03.18.2019

The New Voluntary Disclosure Practice: A Fair Compromise?
Tax Alert | 12.03.2018

UPDATED: Year-End Charitable Giving Ideas: IRA Rollovers and "Bunching" Charitable Deductions
Private Client Alert | 11.28.2018

When Opportunity Knocks: Qualified Opportunity Zone Proposed Regulations Released
Business, Investment & Transactional Tax Alert | 10.22.2018

EXPERT ANALYSIS: U.S. Owners of Foreign Trusts Face Increased IRS Scrutiny
Article | *Law360*, 06.21.2018

IRS's Offshore Voluntary Disclosure Program Ending: Impact on U.S. Taxpayers
Tax Alert | 03.14.2018

2018 Ushers In New Estate Planning Opportunities and Pitfalls
Private Client Alert | 01.18.2018

Tax Reform May Make Payment of Nonbusiness Tax Advice Fees Non-Deductible
Tax Alert | 12.12.2017

Beth Shapiro Kaufman Comments on Extension of Time to Make Portability Election: Additional Remedies
Article | *Courtesy: Leimberg Information Services, Inc. (LISI) at LeimbergServices.com*, 04.18.2017

Tax Plans Compared (December 2016) Individual Income Tax
Private Client Alert | 12.05.2016

Possible Repeal of the Estate Tax in 2017
Private Client Alert | 12.05.2016

On the Centennial Anniversary of the Estate Tax
Article | *Estate Planning Magazine*, 09.23.2016

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