

## 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 Beth Kaufman and Anne O'Brien in Top Financial Advisers Hall of Fame  
*Washingtonian Magazine*, 01.30.2023

*U.S. News – Best Law Firms* Recognizes Caplin & Drysdale as a Top-Tier Firm  
Awards & Rankings | 11.03.2022

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

PODCAST: Beth Kaufman Discusses the Future of Estate Planning  
*ACTEC Trust and Estate Talk Podcast*, 05.03.2022

Super Lawyers® Recognizes Caplin & Drysdale Attorneys Among Washington's Top Lawyers  
Awards & Rankings | 05.02.2022

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

Caplin & Drysdale Earns 10 Tier 1 Practice-Area Rankings in 12th Edition of *U.S. News – Best Law Firms®*  
Awards & Rankings | *U.S. News & World Report*, 11.04.2021

Beth Kaufman Comments on Estate Planning Under Proposed Tax Plan in Bloomberg  
*Bloomberg Law*, 10.29.2021

Tax Notes Quotes Beth Kaufman on Recent Tweaks to Grantor Trust Reform  
*Tax Notes*, 10.11.2021

Beth Kaufman Weights in on Grantor Trust Reforms in Tax Notes  
*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

Caplin & Drysdale Attorneys Listed as "Best Lawyers In America"  
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

Super Lawyers® Names Caplin & Drysdale Attorneys Among D.C.'s Most Prominent Practitioners  
Awards & Rankings | *Super Lawyers*, 04.29.2021

Bloomberg Law Quotes Beth Kaufman on Potential Changes in Biden's Tax Plan  
*Bloomberg Law*, 04.27.2021

Caplin & Drysdale Welcomes Meghan Muncey  
04.12.2021

PODCAST: Beth Kaufman Discusses Possible Tax Changes Effecting Estate Planning Under Biden  
Administration

*ACTEC Trust and Estate Talk Podcast*, 03.30.2021

Beth Kaufman Weighs in on Possible Changes to Valuation Discounts in Bloomberg Law  
*Bloomberg Law*, 03.14.2021

Beth Kaufman Comments on How Upcoming Tax Changes Could Effect Estate Planning  
*Tax Notes*, 02.19.2021

Beth Kaufman Comments on Estate Planning Under New Biden Administration  
*Tax Notes*, 01.14.2021

Beth Kaufman Weighs in on Tax Regulations Under New Biden Administration  
*Tax Notes*, 12.30.2020

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

Washingtonian Recognizes Caplin & Drysdale Attorneys Among Washington's Top Lawyers  
Awards & Rankings | *The Washingtonian Magazine*, 11.19.2020

WSJ Quotes Beth Kaufman on Estate Planning Under the Biden Administration  
*Wall Street Journal*, 11.13.2020

Tier 1 Rankings for Caplin & Drysdale's Practice Groups in U.S. News – Best Law Firms' List  
Awards & Rankings | *U.S. News & World Report*, 11.05.2020

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

Caplin & Drysdale D.C. Attorneys are Recognized by Super Lawyers®  
Awards & Rankings | *Super Lawyers*, 05.04.2020

Tax Notes Quotes Beth Kaufman on GRATs  
*Tax Notes*, 04.21.2020

Tax Notes Quotes Beth Kaufman on Adequate Disclosure on Gift Tax Returns  
*Tax Notes*, 01.31.2020

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

Caplin & Drysdale Attorneys Listed as "Best Lawyers In America"  
Awards & Rankings | 08.15.2019

*Chambers High Net Worth Guide* Recognizes Caplin & Drysdale as Top-Notch Law Firm for Private Wealth Law Awards & Rankings | *Chambers High Net Worth Guide*, 08.14.2019

Tax Notes Quotes Megan Wernke on *Fielding* and *Kaestner* Cases  
*Tax Notes*, 07.23.2019

Super Lawyers® Recognizes 22 Caplin & Drysdale Attorneys in D.C.  
Awards & Rankings | *Super Lawyers*, 04.22.2019

MEDIA ADVISORY: Tax Problems Loom in the College Admissions Scandal  
*Caplin & Drysdale, Chartered*, 03.18.2019

New York Times Quotes Beth Kaufman on Senator Warren's Plan to Tax the Wealthy  
*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

PODCAST: Beth Kaufman Discusses Priority Guidance Plan from the IRS and Treasury  
*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

PODCAST: Beth Kaufman Discusses Tax Cuts and Jobs Act in Follow Up Podcast  
*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  
Awards & Rankings | *National Association of Estate Planners & Councils (NAEPC)*, 11.28.2018

CBS News Quotes Beth Kaufman on Potential Revelations in President Trump's Tax Return  
*CBS News' MoneyWatch*, 11.09.2018

Caplin & Drysdale Earns 11 Tier 1 Practice-Area Rankings in Ninth Edition of *U.S. News – Best Law Firms®*  
Awards & Rankings | *U.S. News & World Report*, 11.01.2018

Beth Kaufman and Mark Matthews Talk to ABC News on Trump Tax Investigation  
*ABC News*, 10.29.2018

Bloomberg Quotes Victor Jaramillo on Using Opportunity Zone Funds to Reduce Taxes  
*Bloomberg*, 10.19.2018

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

The Hill Quotes Beth Kaufman on Legal Obstacles to Pursuing Trump Tax Charges  
*The Hill*, 10.05.2018

The Hill Quotes Beth Kaufman on Calls to Revise Estate Tax Rules  
*The Hill*, 10.05.2018

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  
*Accounting Today*, 10.04.2018

Caplin & Drysdale's Newest Member Victor Jaramillo Serves Tax Controversy Needs of Global Community  
*Caplin & Drysdale*, 10.03.2018

POLITICO Quotes Beth Kaufman and Mark Matthews on Trump Tax Investigation  
*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"  
Awards & Rankings | 08.15.2018

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  
*Law360*, 07.19.2018

Law360 Quotes Victor Jaramillo: FATCA Complexity Leading to Lackluster Results  
*Law360*, 07.12.2018

PODCAST: Beth Kaufman Discusses 9100 Relief  
*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

InvestmentNews Quotes Beth Kaufman on How Changes to 'Kiddie Tax' Will Impact Families  
*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

18 Caplin & Drysdale Attorneys Recognized by Super Lawyers in D.C.  
04.23.2018

Beth Kaufman Discusses Inadvertent GST Exemption Exclusions with Tax Notes  
*Tax Notes*, 03.16.2018

Anne O'Brien and Clark Armitage Listed Among Top 30 U.S. Lawyers by Euromoney  
Awards & Rankings | *Euromoney Expert Guides*, 03.02.2018

Law360 Quotes Victor Jaramillo on Reporting Bitcoin for FBAR Filings  
*Law360*, 02.14.2018

Beth Kaufman Comments on New Tax Law Prompting Growth at Law Firms  
*Tax Notes*, 01.22.2018

Caplin & Drysdale Welcomes Former IRS Nonprofit Senior Technical Adviser and Strengthens Tax Controversies and Private Client Groups

*Caplin & Drysdale, Chartered*, 01.16.2018

CNN Money Quotes Beth Kaufman: New Estate Tax Law Gives an Enormous Gift to Rich Families

*CNN Money*, 01.09.2018

How Will Businesses and Individuals be Impacted by Tax Reform?

*Caplin & Drysdale, Chartered*, 01.01.2018

Forbes Talks to Beth Kaufman on Estate Tax Win for the Rich

*Forbes*, 12.21.2017

HuffPost Quotes Beth Kaufman on Kristi Noem's Estate Tax Bill

*HuffPost*, 12.21.2017

HuffPost Quotes Beth Kaufman on Death Tax Impact on Family Businesses

*HuffPost*, 12.07.2017

MEDIA ADVISORY: Will the IRS Know What Gifts Prince Harry Gives Meghan Markle for Christmas?

*Caplin & Drysdale, Chartered*, 11.30.2017

Stafford Smiley Comments on Changes to the Estate Tax in the House Tax Bill

*Tax Notes*, 11.20.2017

Law360 Quotes James Salles: Tax Bill's Legal Fee Provision May Burden Attorneys

*Law360*, 11.16.2017

Tier 1 Rankings for Caplin & Drysdale's Legal Services in 2018 U.S. News – Best Law Firms' List Awards & Rankings | *U.S. News & World Report*, 11.01.2017

Beth Kaufman Comments on IRS Withdrawal of Proposed Estate and Gift Tax Regs

*ThinkAdvisor*, 10.18.2017

CNN Money Quotes Beth Kaufman on Repeal of Estate Tax

*CNN Money*, 10.10.2017

Caplin & Drysdale Welcomes Amanda Leon

09.19.2017

Chambers Lists Caplin Lawyers as Leaders in Private Wealth Law

Awards & Rankings | *Chambers High Net Worth Guide*, 09.15.2017

Caplin & Drysdale Earns Top Ranking in 2018 "Best Lawyers in America"

Awards & Rankings | 08.15.2017

7 Caplin & Drysdale Lawyers Listed as Leaders in Their Field by Expert Guides

Awards & Rankings | *Expert Guides*, 07.25.2017

New York Times Quotes Jonathan Brenner on Hedge-Fund Managers' Looming Tax Bills

*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

*Caplin & Drysdale, Chartered*, 06.12.2017

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

*The Wall Street Journal*, 06.09.2017

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

*The Washington Post*, 06.01.2017

Caplin & Drysdale Lawyers Listed Among D.C.'s Most Prominent Practitioners

Awards & Rankings | *Super Lawyers*, 04.27.2017

Beth Kaufman Discusses Trump's Access to Trust Assets with The Washington Post

*The Washington Post*, 04.03.2017

Beth Kaufman Speaks to Investment News on Possible Estate Tax Repeal

*Investment News*, 02.06.2017

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

*Executive Leaders Radio*, 12.20.2016

Northern Virginia Magazine Names Beth Kaufman and Jeffrey Liesemer "Top Lawyers" for 2016

Awards & Rankings | *Northern Virginia Magazine*, 11.22.2016

Caplin & Drysdale's Core Legal Services Earn Tier 1 Rankings in "Best Law Firms" for 2017

Awards & Rankings | *U.S. News & World Report*, 11.02.2016

Beth Kaufman Talks to Forbes About Maryland Estate Tax Exemptions

*Forbes*, 10.25.2016

Forbes Quotes Beth Kaufman on Estate Tax Changes for Wealthy Individuals

*Forbes*, 10.25.2016

Beth Kaufman and Anne O'Brien Named Leading "Women in Business Law" for Trusts and Estates

Awards & Rankings | *Expert Guides*, 09.08.2016

Beth Kaufman Discusses Succession Planning with The American Lawyer

Press Releases | *The American Lawyer*, 09.01.2016

Best Lawyers in America Lists 18 Caplin & Drysdale Attorneys

Awards & Rankings | *U.S. News & World Report*, 08.15.2016

Beth Kaufman Comments on Proposed Estate Tax Regulations in Washington Post

*The Washington Post*, 08.02.2016

Caplin & Drysdale Listed in "Above the Law's" Tax Firm Power List

Awards & Rankings | *Above the Law*, 07.29.2016

Caplin & Drysdale Attorneys Listed as "Leaders in Their Field" for Private Wealth Law

Awards & Rankings | *Chambers High Net Worth Guide*, 06.24.2016

Three Caplin Lawyers Distinguished by Best Lawyers

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

Caplin & Drysdale Listed Among Top Lawyers for Tax, Bankruptcy, Estate Planning and Political Law

Awards & Rankings | *Chambers USA*, 06.01.2016

Anne O'Brien Shortlisted for Best in Wealth Management

Awards & Rankings | *Euromoney Legal Media Group*, 05.20.2016

Super Lawyers Recognizes Caplin & Drysdale Lawyers from Several Practice Areas

Awards & Rankings | *Super Lawyers*, 04.26.2016

Patricia Lewis and Anne O'Brien Named in 2016 "Best of the Best" Global Ranking

Awards & Rankings | *Expert Guides*, 04.05.2016

Beth Kaufman Comments on the State of the Estate Tax

*Financial Advisor IQ*, 03.22.2016

Washingtonian Names Beth Kaufman and Anne O'Brien Among 2016 Top Wealth Advisers

Awards & Rankings | *The Washingtonian Magazine*, 03.21.2016

Beth Kaufman Discusses Tax Benefits of Succession Planning for Family-Owned Businesses

*Builder Magazine*, 03.14.2016

Beth Kaufman Comments on Expanding Estate Tax Basis Consistency Mandate

*Bloomberg BNA, Daily Tax Report*, 02.09.2016

U.S. News & World Report Quotes Anne O'Brien on Advice Financial Advisors Give Their Clients

*U.S. News & World Report*, 01.29.2016

Anne O'Brien Named a Leading Practitioner in Who's Who Legal

Awards & Rankings | *Who's Who Legal*, 12.23.2015

Caplin & Drysdale Attorneys Comment on Chan Zuckerberg Initiative

*Tax Notes*, 12.11.2015

WSJ Quotes Beth Kaufman on Mark Zuckerberg's Philanthropic Goals

*WSJ*, 12.04.2015

Washingtonian Names Caplin & Drysdale Attorneys Among Washington's Top Lawyers

Both | 11.19.2015

CNBC Speaks to Beth Kaufman on Widely Ignored Estate Tax Requirement

*CNBC*, 11.04.2015

U.S. News & World Report Lists Caplin & Drysdale in "Best Law Firms" for 2016

Awards & Rankings | 11.02.2015

*The American Lawyer* Names Caplin & Drysdale Global Legal Award Recipient for Swiss Tax Investigations

Awards & Rankings | *The American Lawyer*, 07.31.2015

Caplin & Drysdale Lawyers Listed Among World's Leading Women in Business Law

Awards & Rankings | *Expert Guides*, 07.28.2015

Caplin & Drysdale's New York Office Welcomes Jonathan Brenner to Tax Practice

Press Releases | 06.09.2015

Beth Kaufman Speaks to The Wall Street Journal on Mikel Estate Tax Case  
*The Wall Street Journal*, 05.22.2015

Clients and Peers Distinguish Caplin & Drysdale in Chambers' Rankings  
Awards & Rankings | *Chambers USA*, 05.19.2015

Daily Tax Report Quotes Beth Kaufman on Carryover Basis Rules  
*Daily Tax Report*, 05.08.2015

Super Lawyers Lists Caplin & Drysdale Lawyers  
Both | *Caplin & Drysdale*, 04.23.2015

Finance Monthly Names Caplin & Drysdale Private Client Law Firm of the Year  
Awards & Rankings | *Finance Monthly Magazine*, 02.18.2015

Caplin & Drysdale Elects Three New Members  
Press Releases | *Caplin & Drysdale*, 02.02.2015

POLITICO Quotes Beth Kaufman on Next White House Battle: Inheritance Taxes  
*POLITICO Pro*, 01.30.2015

Caplin & Drysdale Names Beth Kaufman President  
Press Releases | *Caplin & Drysdale*, 01.26.2015

Beth Kaufman Comments on Potential for Repeal of the Estate Tax  
*Bloomberg BNA*, 01.23.2015

Beth Kaufman Comments on 6 Life Events That Change Your Taxes  
*U.S. News & World Report*, 01.20.2015

The Wall Street Journal Quotes Beth Kaufman: Obama Takes Aim at 'Step Up' Tax Break on Inherited Assets  
*The Wall Street Journal*, 01.20.2015

Law360 Quotes Kirsten Burmester: As FATCA Slowly Rolls Out, Its Impact Is Uneven  
*Law360*, 11.20.2014

Michael Pfeifer and Kirsten Burmester Comment on Tax Returns of Americans Living Abroad Under Scrutiny  
*MainStreet*, 11.10.2014

Worldwide Tax Daily Quotes Victor Jaramillo: IRS Working with SSA on Offshore Streamlined Filing  
Requirement  
*Worldwide Tax Daily*, 11.07.2014

Victor Jaramillo Comments on Non-Willful Conduct Under Streamlined OVDP  
*Bloomberg BNA*, 11.07.2014

Caplin & Drysdale Receives High Rankings from 2015 U.S. News-Best Law Firms  
Awards & Rankings | *U.S. News - Best Lawyers*, 11.04.2014

Beth Kaufman and Anne O'Brien Named Top Estate Attorneys in Washingtonian Magazine  
Awards & Rankings | *The Washingtonian Magazine*, 10.30.2014

Fortune Lists Caplin & Drysdale Lawyers Among Leaders in the Law  
Awards & Rankings | *Fortune Magazine*, 10.06.2014

Caplin & Drysdale Lawyers Chosen as "The Best of the Best USA" for 2014  
Awards & Rankings | 09.16.2014

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

Beth Kaufman Comments on DOMA Ruling and Extension of Benefits to Gay Married Couples  
*Bloomberg BNA Daily Tax Report*, 06.27.2013

Tax Notes Quotes Beth Kaufman on the Estate Planning Implications of the DOMA Ruling  
*Tax Notes*, 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 Discusses Tax Guidance at ABA RPTE CLE Conference  
Washington, D.C., 05.12.2023

Beth Kaufman Leads Discussion on Recent Developments in Estate Planning at Northern Virginia Estate Planning Council Meeting  
McLean, VA, 01.24.2023

Beth Kaufman Addresses Questions on Recent Developments in Estate Planning at Heckerling Institute on Estate Planning  
Orlando, Florida, 01.11.2023

Beth Kaufman Analyzes Recent Developments in Estate Planning at Heckerling Institute on Estate Planning  
Orlando, Florida, 01.09.2023

Megan Wernke and Melissa Wiley Analyze Formula Clauses at MSBA Advanced Estate Planning Institute Live! Casino and Hotel, Hanover, MD, 11.17.2022

Beth Kaufman, Megan Wernke, and Meghan Federman Provide a Federal Tax Update at MACPA 2022 Advanced Tax Institute  
Martin's West, Woodlawn, MD, 11.08.2022

Anne O'Brien Discusses Closely Held Entities ACTEC Fall Meeting  
Hotel Fairmont San Francisco, 11.04.2022

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

Beth Kaufman Explores the Latest Development Regarding Tax Legislation at PGRT  
8:30 AM – 9:30 AM  
11.18.2021

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

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11.28.2017

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

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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

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10.27.2017

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

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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  
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