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Proving an Inter Vivos Gift in New York: Lessons from 'Matter of Ingberman'

New York Litigation Partner Gregory Bruno and Trusts and Estates Associate Emma Pletenycky recently co-authored an article for the *New York Law Journal* titled “Proving an Inter Vivos Gift in New York: Lessons from Matter of Ingberman.”

In the piece, they use Matter of Ingberman as a case study to demonstrate how New York courts rigorously apply the evidentiary requirements of intent, delivery, and acceptance when determining the validity of inter vivos gifts. The authors explain that, despite testimony and written documentation, the court ultimately found no valid gift because of the lack of formal transfer and inconsistent conduct. They emphasize that the decision highlights the importance of clear documentation, legal formalities, and consistent actions—reminding practitioners that even intra-family transfers must be handled with the same rigor as arm's-length transactions to avoid disputes.

Read the full article here.

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