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Jordana G. Schreiber

An Ideal Career: Analytical Thinking With a Personal Touch

A "born-and-raised" New Yorker who now calls Boston home, Jordana Schreiber landed in the trusts and estates world after working early in her career at a prestigious advertising agency. Jordana enjoyed the strategic planning side of advertising. She wanted to develop her analytical talents further, and she figured that law school would be an ideal venue to do so.

While she was attending the Benjamin N. Cardozo School of Law, one of Jordana's first summer associate interviews involved a happy accident, where she had an opportunity to speak with a trusts and estates associate. Up until then, she had thought of trusts and estates as a depressing area of law that solely dealt with death. But as soon as they started talking, she realized it was the right direction for her. The blend of technical tax-planning challenges and the reward of personal client relationships really appealed to her.

Jordana's experience as a lecturer in law at Boston University School of Law and as an adjunct professor of legal research and writing at the New England School of Law refined her ability to convey highly technical concepts in an easily understandable manner. Jordana counsels high net worth clients, helping them develop estate, gift and succession plans. Her extensive estate planning experience encompasses the complete range of wills and trusts, and she advises clients on tax minimization strategies as well as tax, insurance and philanthropic planning.

An overarching concern in Jordana's practice area is determining the appropriate way to grant children access to wealth. She wants to identify a structure that benefits them most. Jordana sets up vehicles to minimize taxes, but she is very mindful of how best to combine that with a client's broader intentions and the legacy they wish to leave behind. She believes her first, and most important, assignment is to listen rather than talk, to really pay attention to how clients describe their values and goals.

"Our job is to figure out the best way to meet a client's objectives," Jordana says. "It can be from a philanthropic standpoint—how do you want to convey your philanthropic ideals and the values you wish to carry forward to your children? We can explore the benefits of setting up a private foundation or a donor-advised fund."

Jordana thrives on the opportunity to help clients ensure genuine impact with their philanthropic work. She works with foundations and clients who have clear visions of how they wish to build and create a better society for present and future generations. Jordana highly values the opportunity to help support and inspire other people at such a significant level.

Client Peter Caparso worked with Jordana to set up multiple trusts and optimize his family's estate plan. He values Jordana's in-depth knowledge, responsiveness and warmth. "One of the most refreshing things about working with Jordana is that she has no ego—she just wants to be able to satisfy her clients' needs. We find as our situation changes, we throw new and different scenarios at her, and she consistently provides comprehensive and complete solutions. She focuses on offering us sound guidance so we can make an educated decision. We truly feel fortunate to have such a trustworthy and kind person working with us," he says.

Jordana appreciates the breadth of experience in her practice group at Day Pitney, and she relies on colleagues across the firm for guidance on issues adjacent to tax and estate planning. She and her colleagues at Day Pitney monitor developing legislation to determine how it will play out for clients. Right now, Jordana notes it is critical to set clients up in an optimal position so they don't miss out on future opportunities.

TRUSTS AND ESTATES

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