



G. Whitaker

Of Counsel

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OVERVIEW

G. "Warren" Whitaker assists high net worth individuals and multinational families with complex domestic and international estate planning and related income tax, corporate and personal financial planning. Clients seek his experience with sophisticated international transactions; trust and estate issues, both domestic and international; family office needs; and trust services and fiduciary compliance. He is a former member of the firm's Executive Board.

Warren is a prolific writer and international speaker. Since 2003, he has been published or cited nearly 80 times in respected news sources, such as *Bloomberg*, *The New York Times* and *Worth Magazine*. He is the lead author of *Private Clients Legal and Tax Planning*, published by PLI in 2016, and co-authored the United States sections of *Tottel's Succession Law* and *Bloomsbury's International Succession Laws*.

He has also served in variety of leadership roles in his professional community, including serving as U.S. chair of the U.K.-based Society of Trusts and Estates Practitioners (STEP), member of the STEP Worldwide Council and chair of the Trusts and Estates Law Section of the New York State Bar Association, as well as the Section's International Estate Planning Committee and Estate Administration Committee and a former district representative.

Among his honors and recognitions is selection as a fellow of the prestigious American College of Trusts and Estates Counsel (ACTEC) and its International Estate Planning Committee.

For years, Warren's peers have named him to lists of top lawyers. As *Chambers USA** (Chambers & Partners) described him, "Warren Whitaker is the leading figure in the practice and is sought by clients for 'his depth of experience and intellect, and his very good grasp of cross-border taxation. In the 2023 edition of *Chambers HNW*, a source noted that, "Warren Whitaker has a wealth of experience in the private wealth space." *Worth Magazine* has also named Warren as one of the nation's 100 Top Wealth Advisors.

**No aspect of these advertisements has been approved by the highest court of any state. See Awards Methodology.*

SERVICES

FAMILY OFFICE

INTERNATIONAL TRUSTS AND ESTATES

TRUSTS AND ESTATES

PRIVATE CLIENT

INSIGHTS

THE DOG ATE MY KIDS' INHERITANCE: PROVIDING FOR PETS IN AN ESTATE PLAN

Author, October 2023, *New Jersey Lawyer*

"ADVANTAGES OF USING A CONNECTICUT CORPORATE TRUSTEE," SALISBURY BANK WEALTH ADVISORY

Speaker, December 15, 2022, Salisbury Bank Wealth Advisory

U.S. TAX PLANNING FOR NON-U.S. PERSONS, ASSETS AND TRUSTS - AN INTRODUCTORY OUTLINE

Co-author, October 5, 2023, *Day Pitney White Paper*

THE DOGS ATE MY KIDS' INHERITANCE: PROVIDING FOR PETS IN AN ESTATE PLAN

Author, June 16, 2022, *PLI Chronicle*

COVID-19'S ETHICAL AND LEGAL PRACTICE IMPLICATIONS, NEW YORK HISTORICAL SOCIETY'S PLANNED GIVING ADVISORY COUNCIL

Speaker, October 22, 2020, New York, NY

NEWS

CHAMBERS HIGH NET WORTH RECOGNIZES 20 DAY PITNEY ATTORNEYS FOR PRIVATE WEALTH LAW

Featured, July 20, 2023, *Day Pitney Press Release*

'GUNTHER'S MILLIONS' BEGS THE QUESTION: ARE YOU PREPARED TO LEAVE A FORTUNE TO YOUR PET?

Featured, February 3, 2023, *Jezebel*

CHAMBERS HIGH NET WORTH RECOGNIZES 20 DAY PITNEY ATTORNEYS FOR PRIVATE

WEALTH LAW

Featured, July 22, 2022, *Day Pitney Press Release*

CHAMBERS HIGH NET WORTH RECOGNIZES 20 ATTORNEYS FOR PRIVATE WEALTH LAW

Featured, July 26, 2021, *Day Pitney Press Release*

SANNA AND WHITAKER NAMED TO LEGAL WEEK'S PRIVATE CLIENT GLOBAL ELITE FOR 2021

Featured, February 5, 2021, *Legal Week*

EDUCATION AND CREDENTIALS

EDUCATION

Columbia Law School, J.D., TEST

Rutgers College, B.A., TEST

ADMISSIONS

State of Connecticut

State of New Jersey

State of New York

AFFILIATIONS

American College of Trust and Estate Counsel (ACTEC)

RECOGNITION AND COMMUNITY

RECOGNITION

Chosen for inclusion in *Who's Who Legal* (Law Business Research Ltd), Private Clients, 2018, 2021, 2024

Chosen for inclusion in *Chambers HNW Guide* (Chambers & Partners) of recognized practitioners for Private Wealth Nationwide, 2017-2023; USA Eastern Region, 2016, 2020-2023; New York, 2016-2023

Selected to the list of *Private Client Global Elite* by *Legal Week* (ALM Media Properties, LLC), 2017-2021

Chosen for inclusion in *The Best Lawyers in America*, Trusts and Estates, 2006-2024

Selected to the list of New York *Super Lawyers* (Thomson Reuters), Estate Planning and Probate,

International, Tax, 2007-2019, 2022

Chosen for inclusion in the *Chambers Global* (Chambers & Partners) 2008, 2009, 2010, 2016 and 2020

Chosen for inclusion in the *Chambers USA Legal Directory* (Chambers & Partners) of recognized practitioners for wealth management Nationwide, 2009-2016

Recipient of 2015 Society of Trust and Estate Practitioners; Founder Award for Outstanding Achievement

Named in *Worth Magazine's* 2006 "100 Top Attorneys" List

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COMMUNITY

New York Historical Society, Planned Giving Advisory Council, Co-chair

Shakespeare's Globe USA, Director

Library of America, Fellow