

Services & Industries

Private Client

OVERVIEW

Day Pitney's lawyers have extensive experience serving the unique needs of individuals and their families, fiduciaries, and tax-exempt entities. We have one of the largest private client practices in the country, and our lawyers collectively have hundreds of years of experience helping our clients plan for the future.

We offer our clients a complete range of services in the following areas:

- Estate planning
- Estate, gift and income tax planning
- Business succession planning
- Estate administration
- Trust administration services
- Guardianships and conservatorships
- Disabilities and special needs planning
- Probate controversies
- International trusts and estates planning
- Tax-exempt organizations and charitable giving
- Art collections and investments

Day Pitney's private client lawyers regularly work in collaboration with our corporate, employment, real estate, trial and environmental lawyers to achieve our clients' individual and business objectives.

RECOGNITION*

Recognized with "Cyber Security" Award by *Family Wealth Report*, 2023

Family Wealth Report Awards 2023: Winner Cyber Security. Day Pitney LLP

Named "Law Firm of the Year," in the "Best Law Firms" Trusts and Estates Law category by *U.S. News & World Report* and *Best Lawyers®*, 2021

Named a Finalist for "Legal Team of the Year," by *Family Wealth Report*, 2021

Shortlisted for "Best Law Firm - Estates and Trusts" by *Private Asset Management Awards*, 2021

Shortlisted for "USA Private Client Team of the Year – East Coast," by *Chambers HNW* (Chambers & Partners), 2020

Chambers Shortlisted High Net Worth Awards

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Named "Best Law Firm – Estates and Trusts" by *Private Asset Management*, 2020

2020 PAM Award

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Shortlisted for "Legal Team of the Year," by *Family Wealth Report*, 2019

Family Wealth Report Awards 2019 Shortlisted

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Named "Law Firm of the Year" by *Family Wealth Report*, 2017

Winner Family Wealth Report Awards 2017

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Finalist in "Accounting, CPA or Law Firms Serving Family Offices" category for Family Wealth Alliance Best in the Industry Awards, 2018

The Family Wealth Alliance

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Shortlisted in two categories, "Best Private Client Law Firm" and "Best Trusts and Estates Division," by Private Asset Management (PAM), 2018

Private Asset Management Awards 2018 Shortlisted

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Shortlisted in two categories, "Legal Team of the Year" and "Family Wealth Counseling," by *Family Wealth Report*, 2018

Family Wealth Report New York Awards 2018 Shortlisted

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Named a Family Office "Industry Awards" Finalist by *Wealth Management*

WealthManagement.com 2017

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Ranked as "Highly Commended" in categories for "Best Private Client Law Firm" by Private Asset Management (PAM), 2017, 2019

Private Asset Management Awards - Highly Commended - 2017

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Shortlisted for "Law Firm of the Year" by *Family Wealth Report*, 2016

Shortlisted Family Wealth Report 2016

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Ranked Nationwide, and Band 1 in Private Wealth Law, CT and MA, by *Chambers HNW* (Chambers & Partners), 2016-2020

Ranked Band 1 in Wealth Management, Nationwide, by *Chambers USA* (Chambers & Partners), 2010-2016

Chambers USA 2016

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**No aspect of these advertisements has been approved by the Supreme Court of New Jersey. See [Awards Methodology](#).*

AFFILIATIONS

Family Office Association, Resource Council Member

[Family Office Association Member](#)

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INSIGHTS

[“Innovations in Addressing Elder Fraud and Abuse: Leveraging Law and Technology”, Yale School of Law](#)

February 16, 2024

Last week, New Haven Partner Rebecca Iannantuoni participated in Yale's School of Law seminar for "Innovating Elder Justice: Law, Medicine, and Technology to Address Abuse and Financial Exploitation in Today's Aging Society."

Message from the Section Chair

January 25, 2024

Day Pitney Private Client Partner Michael S. Schwartz authored the introduction to the Winter issue of the New York State Bar Association's *Trusts and Estates Law Section Journal*.

"Planning for Persons with Disabilities: Special Needs Trusts and Other Considerations," New England Village

January 24, 2024

Earlier this week, Boston Attorneys Meredith Greene and Kaitlyn Sapp met with the Family Association of New England Village, a Massachusetts non-profit that serves adults with intellectual and developmental disabilities, to present their expertise regarding Special Needs Planning.

"Trust & Estates Mid-Year Review", Boston Bar Association Virtual Webinar

January 17, 2024

Boston Attorney Susan A. Robb, Counsel in the Private Client Department, presented at the Boston Bar Association's Trust & Estates Mid-Year Review on January 17.

The Importance of Flexibility to the Trusts and Estates Attorney

January 12, 2024

Day Pitney Private Client Partner Michael S. Schwartz authored the article "The Importance of Flexibility to the Trusts and Estates Attorney" in the *New York Law Journal*.

NEWS

Day Pitney Named Finalist in Three Categories for Family Wealth Report Awards

February 20, 2024

Day Pitney Press Release

Day Pitney Secures "Best Law Firm – Estates and Trusts" Award at the Private Asset Management (PAM) Awards 2024

February 13, 2024

Day Pitney Press Release

Practical Considerations in Dealing with Incapacity

February 12, 2024

Day Pitney Trusts and Estates Attorney Keith Bradoc Gallant was featured on the American College of Trust and Estate Counsel's (ACTEC) Trust and Estate Talk podcast episode "Practical Considerations in Dealing with Incapacity."

People on the Move

February 5, 2024

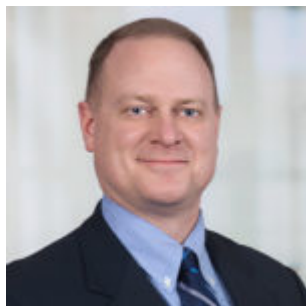
The promotion of A. Michael Wargon to partner was featured in *The Palm Beach Post's* People on the Move column.

Three Day Pitney Partners Named by Daily Business Review as 2024 Florida Legal Awards Honorees

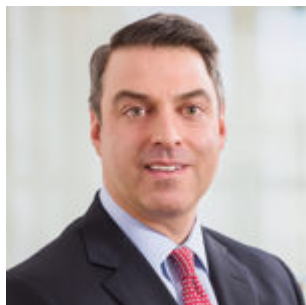
February 2, 2024

Day Pitney is proud to announce that three of the firm's South Florida-based partners have been recognized for the Florida Legal Awards from the *Daily Business Review*.

CONTACTS



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