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HIGHLIGHTS

- > Counseling closely-held businesses, multi-generational families, and high net worth individuals in a manner which integrates estate, income tax, and financial planning
- > Handling tax controversy matters before the Internal Revenue Service
- > Counseling medical groups on dealings with hospitals and managed care organizations

REPRESENTATIVE EXPERIENCE

- > Estate planning
- > Estate administration
- > Income tax planning
- > Sales and purchases of businesses
- > Sales of medical practices
- > Private foundations
- > Shareholder, partnership, and limited liability company agreements
- > Employment agreements
- > Prenuptial agreements
- > Tax disputes with the Internal Revenue Service
- > Will contests

OTHER EXPERIENCE

- > KCS Energy, Inc. (NYSE), Director: 1998-2005
- > Constellation Bank, N.A. (formerly National State Bank, Elizabeth, NJ), Director: 1983-1993; Interim President and CEO: 1991

PROFESSIONAL & CIVIC ACTIVITIES

- > Liberty Hall Foundation, President
- > Liberty Hall Museum, Trustee



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JOEL D. SIEGEL, Shareholder

OTHER DISTINCTIONS

- > American College of Trust and Estate Counsel, Fellow



DISCLAIMER

No aspect of this advertisement has been approved by the Supreme Court of New Jersey.

PRACTICE AREAS

- > Tax Law
- > Trusts and Estates
- > Professionals

EDUCATION

- > The Wharton School, University of Pennsylvania (B.S. 1963)
- > University of Pennsylvania (LL.B. 1966)
 - > *Magna Cum Laude; Editor, Law Review*
- > New York University School of Law (LL.M., in taxation, 1970)

ADMISSIONS

BAR ADMISSIONS

- > New Jersey 1966
- > New York 1981

COURT ADMISSIONS

- > U.S. District Court, District of New Jersey
- > U.S. Tax Court

RELATED NEWS & PUBLICATIONS

- > Seven Attorneys from OLSS Selected for Inclusion in 2018 Edition of New Jersey Super Lawyers and Rising Stars
- > Seven OLSS Attorneys Named to 2017 New Jersey Super Lawyers and Rising Stars
- > Chambers HNW Honors OLSS for Excellence in Private Wealth Law
- > Seven OLSS Attorneys Named to 2016 New Jersey Super Lawyers and Rising Stars
- > Seven OLSS Attorneys Named to 2015 New Jersey Super Lawyers and Rising Stars
- > Six OLSS Attorneys Named to 2014 New Jersey Super Lawyers and Rising Stars
- > Five OLSS Attorneys Named to 2013 New Jersey Super Lawyers and Rising Stars



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- > Six OLSS Attorneys Named to 2012 New Jersey Super Lawyers and Rising Stars
- > Best Lawyers Names Two OLSS Attorneys "Lawyers of the Year"
- > Seven OLSS Attorneys Named Best Lawyers in America 2012
- > Nine OLSS Attorneys Named to 2011 New Jersey Super Lawyers and Rising Stars