Kathryn von Matthiessen

Partner

New York Office

+1.212.940.8517

kathryn.vonmatthiessen@katten.com

Practices

FOCUS: Private Wealth

Business Succession Planning

Charitable Planning, Philanthropy and Nonprofit Organizations

International

International Private Wealth

Industries

Family Offices

Private Client Services

Education

LLM (Taxation), New York University School of Law

JD, Columbia Law School

BA, Carleton College, *magna cum laude, Phi Beta Kappa*

Bar Admissions

New York

Florida

Community Involvements

American Bar Association

International Bar Association

Florida Bar Association

New York State Bar Association

Society of Trust and Estate Practitioners (STEP), Vice-Chair of STEP New York

American College of Trust and Estate Counsel

For ultra-high-net-worth individuals, Kathryn von Matthiessen offers sophisticated yet practical counsel on income and transfer tax optimization. She provides estate and business succession planning for domestic and international private clients, and has extensive experience in cross-border issues.

Expansive international private client background

Kathryn's international private client experience is particularly broad. For clients coming to the United States she provides pre-residency planning. For foreign families with US members, she uses a number of tools to facilitate tax-efficient wealth transfers to US family members while minimizing US gift and estate tax liability for foreign settlors. Kathryn also advises clients leaving the United States on outbound planning matters. For international clients everywhere, she helps to structure global succession plans and assists them in selecting appropriate jurisdictions.

Kathryn advises domestic and international families that own many different asset classes, from operating businesses to hedge fund interests to real estate to intellectual property and artwork. In her estate planning for them, she uses a variety of techniques (both charitable and non-charitable) to minimize taxes and achieve her clients' goals.

Kathryn advises fiduciaries including trust companies on administering complex estates and trusts. She also has a broad background in business succession planning through the use of trusts, private trust companies, buy-sell agreements and shareholder agreements.

Kathryn von Matthiessen

Partner

"Kathryn is an excellent lawyer. She is extremely responsive, she is extremely knowledgeable and also very proactive. She is imaginative in her solutions. I really enjoy working with her." "She is really hard-working and gifted on technical tax issues. She is very practical and really knows her stuff. She is a go-to on international matters."

- Chambers High Net Worth 2022 (New York, Private Wealth Law) survey response

Recognitions

Recognized or listed in the following:

- *Best Lawyers in America*
  - Trusts and Estates, 2019–2023
- *Chambers High Net Worth*
  - New York: Private Wealth Law, 2019–2022
- *Citywealth*
  - Magic Circle Awards: Woman of the Year (Gold), 2022
  - International Powerwomen Top 100, 2019
  - IFC Powerwomen Top 200, 2018
  - Powerwomen Awards: Woman of the Year
    - North America Silver Award, 2019
    - North America Gold Award, 2020
- *Latinvex*
  - Latin America's Top 100 Female Lawyers, 2016, 2018–2019
- *Legal Week*
  - Private Client Global Elite, 2017–2019, 2021
- *Super Lawyers*
  - New York, 2022

News

- Katten Attorneys Earn 2022 New York Super Lawyers and Rising Stars Distinctions (September 29, 2022)
- Katten Attorneys Recognized by *Best Lawyers®* (August 18, 2022)

- Katten Attorneys Score High in *Chambers High Net Worth 2022* Guide (July 14, 2022)
- Katten Private Wealth Practice Receives Two Law Firm of the Year Awards (May 19, 2022)
- Katten Attorneys Listed in *The Best Lawyers in America®* (August 19, 2021)
- Katten Attorneys Selected for *Chambers High Net Worth 2021* Guide (July 22, 2021)
- Katten Private Wealth Attorneys Listed in Global Elite Directory 2021 (February 2, 2021)
- Katten Attorneys Distinguished as Top Legal Talent in the 2021 *Best Lawyers in America* and *Best Lawyers: Ones to Watch* Lists (August 20, 2020)
- A Dozen Katten Partners Recognized in *Chambers High Net Worth* Guide (July 9, 2020)
- Kathryn von Matthiessen talks to *Bloomberg Law* about US popularity for people looking to immigrate (November 11, 2019)
- Kathryn von Matthiessen Named as One of Top 100 Female Lawyers in Latin America 2018 (May 2, 2018)
- Kathryn von Matthiessen Rejoins Katten as Private Wealth Partner (August 10, 2017)

Publications

- 2021 Year-End Estate Planning Advisory (November 22, 2021)
- Proposed Tax Legislation Would Dramatically Impact Private Wealth Planning (September 24, 2021)
- 2021 Biden Plan Estate Planning Advisory (January 15, 2021)
- 2020 Year-End Estate Planning Advisory (November 24, 2020)

- Looking Beyond the COVID-19 Crisis (March 23, 2020)
- 2019 Year-End Private Wealth Advisory (November 25, 2019)
- Katten Team Publishes 2018 Year-End Estate Planning Series (December 4–7, 2018)
- 2018 Year-End Estate Planning Advisory (November 19, 2018)
- The Tax Cuts and Jobs Act: Gift, Estate and Generation-Skipping Transfer Tax Reform (February 28, 2018)
- 2017 Year-End Estate Planning Advisory (November 20, 2017)
- Foreign Investment in US Real Estate: Structuring Techniques and Traps for the Unwary (November 3, 2016)
- Breaking Up is Hard To Do: Why Expatriating From the US Requires Careful Tax Planning (February 4, 2016)
- Smooth Move: US Tax Tips Every Top Executive Should Know Before Moving To the United States (September 19, 2015)
- LatAm Clients Investing in South Florida Real Estate—The Need-To-Knows: Part 1 (June 2015)
- The Foreign Trust Audit™: Strategic Review of Foreign Trusts With US Beneficiaries or Settlors (February 2015)
- Through the Looking Glass: Into the Land of Global Tax Transparency? (September 1, 2014)
- Tax Planning for International Families with US Members (May 2014)
- Buyer Beware: US Tax Issues Hidden in Foreign Trust Inventories (January 15, 2014)
- US Tax Issues Hidden in Foreign Trust Inventories (January 2014)
- Foreigners and the Gift Tax (July 6, 2011)
- FATCA and the Trust Industry—Pitfalls to Avoid (2014)

Presentations and Events

- ACTEC Summer Meeting (June 22–26, 2022) | *Speaker* | *Migrating Between Community and Separate Property*
- 27th Annual International Private Client Conference (June 13–14, 2022) | *Speaker* | *Tax residence in Covid times: where do you find yourself as a taxpayer?*
- STEP Miami 11th Annual Summit (May 13, 2022) | *Panelist* | *Welcome to Miami!, ¡Bienvenidos a Miami!: Pre-immigration Planning when moving to the Magic City*
- 17th Annual International Estate Planning Institute (March 31-April 1, 2022) | *Moderator* | *PTCs, Foundations and Comparison of Trust Jurisdictions*
- 9th Annual Tax-Efficient Investing Program (November 3–17, 2021) | *Speaker* | *Financing Premiums* | *Private Wealth – Current Concerns and Solutions*
- STEP LatAm Conference: Building Knowledge Across Borders Advising Families Today and Tomorrow (October 14–15, 2021) | *Presenter* | *Biden and Company Change Rules; United States Tax Considerations for the LatAm Client*
- Private Client Forum Americas 2020 (February 5–7, 2020) | *Speaker*
- The Latest Evolution in Tax-Efficient Investing for Sophisticated Investors, Family Offices, Wealth Advisors, Distributors and Alternative Asset Managers (October 28, 2019)
- STEP LATAM Update: Advanced Planning Techniques for Clients with US Connections, covering Argentina, Brazil, Colombia and Mexico (October 22, 2019) | *Moderator*
- IBA Annual Conference Seoul 2019 (September 22–27, 2019) | *Moderator* | *Good people, bad structures: new CFC rules and US tax reform - do you need to change anything?*

- How to Develop or Expand a Family Office, Including Into Direct Investing (July 18, 2019) | *Panelist*
- 12th Annual ABA/IBA U.S. and Latin America Tax Practice Trends Conference (June 12, 2019) | *Co-Chair* | *Roundtable Session, Wealth Management Workshop II*
- STEP Caribbean Conference (May 12–15, 2019) | *Panelist* | *On-Shore Planning – Off-Shore Solutions*
- Private Client Forum Americas (March 27–29, 2019) | *Panelist* | *Interactive boardroom discussions: The times, they are a-changin'*
- IBA 24th International Private Client Conference (March 3–5, 2019) | *Panelist* | *Hot topics: roundtable*
- The Latest Evolution in Tax-Efficient Investing for Sophisticated Investors, Family Offices, Wealth Advisors, Distributors and Alternative Asset Managers (October 29, 2018) | *Panelist*
- Trust Law: Back to Basics, Advising Latin American Families in a Transparent World (June 21, 2018) | *Presenter*
- Tax and the Political Landscape – Implications of the tax Plan for the PPLI-PPVA Market, 2018 PPLI & VA Forum (June 13, 2018) | *Presenter*
- Private Client Forum Americas 2018: The Ultra High Net Worth Client: From Cradle to Grave (February 7, 2018) | *Speaker* | *Old and New: Breaching the Void*
- Comparison of U.S. Trust Jurisdictions (January 11, 2018) | *Moderator*
- Legal Week Private Client Forum (February 16, 2017) | *Panelist* | *Nowhere to Run, Nowhere to Hide: Protecting the Security of Your Client and Their Family*
- International Trusts & Private Client Forum (October 24–25, 2016) | *Lecturer* | *Ransom Clauses in Trust Deeds. How They Work and Practical Considerations?*
- STEP LatAm Conference (September 30, 2016) | *Lecturer* | *PTCs: The Devil is in the Details*

- University of Miami LL.M Class Lecture (February 2016) | *Lecturer* | *US Transfer Tax Considerations for the International Private Client*
- ABA-IBA U.S.—Latin American Tax Planning Strategies (June 10, 2015) | *Panelist* | *Estate Planning and Abuse of Law*
- University of Miami LL.M Class Lecture (January 2015) | *Lecturer* | *US Transfer Tax Considerations for the International Private Client*
- Mourant Ozannes International Trusts & Private Client Conference 2014 (October 3, 2014) | *Lecturer* | *Wealth Planning for US and UK Beneficiaries: Does One Size Fit All?*
- Family Office Exchange Webinar (June 11, 2014) | *Lecturer* | *Tax and Estate Planning Issues of Multijurisdictional Cross-Border Families*
- Legal Week Trust and Estates Litigation Forum 2014 (March 13, 2014) | *Lecturer* | *BEWARE the Width of the Tax Net: Settlement Tax Traps for Litigators*
- University of Miami LL.M Class Lecture (January 30, 2014) | *Lecturer* | *US Transfer Tax Considerations for the International Private Client*
- 20th World Offshore Convention (November 20–21, 2013) | *Lecturer, Panelist* | *"International Wealth Preservation: Trust Structuring", "What the Latin American Client Wants" and "An Assembly on Private Client Planning"*
- STEP Miami Summit (Mar 31, 2013) | *Lecturer* | *Foreign Trusts with U.S. Beneficiaries — Mistakes Made in Drafting and Administration and How to Avoid Them*
- New York State Bar Association International Section Global Law Week 2013 (May 15, 2013) | *Panelist* | *International Tax, Trusts and Immigration After the Fiscal Cliffs of 2013*
- Estate Planning Council of New York City Estate Planner's Day (May 8, 2013) | *Lecturer* | *Pre-Immigration Planning*
- TTN Conference Miami 2013 (May 3, 2013) | *Lecturer* | *Foreign Trusts with US Beneficiaries: Best Practices for Administration*

- Planning During Turbulent Times (April 26, 2012) | *Speaker* | *Reporting Requirements of US Persons With Interests in Foreign Entities*
- New York State Bar Association International Section Global Law Week 2011 (May 11, 2011) | *Panelist* | *Ten U.S. Cross-Border Tax Traps to Avoid*