Ronni G. Davidowitz

Partner

New York Office

+1.212.940.7197

ronni.davidowitz@katten.com

Practices

FOCUS: Private Wealth

Fiduciary Litigation

Industries

Private Client Services

Education

JD, St. John's University School of Law

BA, Queens College | The City University of New York

Bar Admissions

New York

Court Admissions

US Tax Court

Community Involvements

American College of Trust and Estate Counsel, Charitable Organization Committee, State Chair for Downstate New York

United Jewish Appeal-Federation of Jewish Philanthropies, Former Chair, Trust and Estate Section

The Rockefeller University, Committee on Trust and Estate Gift Plans

NewYork-Presbyterian Hospital, Planned Giving Advisory Council

American Heart Association, Professional Advisory Council

Calvary Fund Inc. of Calvary Hospital, Professional Advisors Council

Association of the Bar of the City of New York

New York State Bar Association, Trusts and Estates Section, Charitable Organizations

Ronni Davidowitz helps clients sort out the legal, business, tax and personal issues that can arise when planning their estates or managing their wealth. As the head of Katten's New York Private Wealth practice, she understands that listening and being responsive are two of the most important services she can bring to her client relationships.

Prepared for a changing landscape

Changes in tax laws, the economic climate, and family and business situations may require adjustments to clients' estate and wealth plans. Ronni is a ready resource to help her client strategies keep pace. High-net-worth individuals, closely held businesses, entrepreneurs, artists and art collectors are among those who rely on Ronni for this close attention to their affairs, as well as her keen planning skills and sympathetic ear.

Ronni finds creative and efficient ways to help her clients avoid litigation. When conflicts do arise, she has a successful track record advising clients on estate and gift tax audits, estate and gift tax litigation and Surrogate's Court contested matters, including probate disputes and fiduciary accountings. She also creates and advises public charities and private foundations.

Recognitions

- American College of Trust and Estate Counsel
  - Fellow
- *Best Lawyers in America*
  - Trusts and Estates, 2008–2020
  - Lawyer of the Year
    - Trusts and Estates, New York City, 2015

and Estate Administration Committees

New York Tolerance Center, Advisory Group Co-Chair

- *Chambers High Net Worth*
  - Leading Individual, 2017–2018
- *Chambers USA*
  - Leading Individual, 2017
- *Citywealth*
  - IFC Top 200 Powerwomen, 2017
  - Leaderslist, 2015–2016
- International Law Office
  - Client Choice Award
    - Private Client - New York, 2016
- Lawyers Division Trusts and Estates Group Honoree
  - UJA-Federation of New York's Annual Dinner, 2016
- Super Lawyers
  - New York, 2006–2019
  - Top Women Lawyers - Trusts and Estates, 2013

News

- Katten Attorneys Nominated to 2019 New York Super Lawyers, Rising Stars Lists (September 12, 2019)
- *Chambers High Net Worth* Guide Recognizes Katten's Private Wealth Practice (July 12, 2019)
- Katten Attorneys Named to 2018 New York *Super Lawyers*, Rising Stars Lists (September 13, 2018)
- Katten's "Top-Notch" Private Wealth Practice Praised in *Chambers High Net Worth* Guide (August 6, 2018)
- Katten Attorneys Acknowledged in 2017 New York Super Lawyers, Rising Stars Lists (September 20, 2017)

- Katten Private Wealth Practice Hailed in *Chambers High Net Worth* Guide for Top Talent and Cross-Border Excellence (September 15, 2017)
- Eighteen Katten Attorneys Distinguished in 2016 New York Metro *Super Lawyers* List (September 21, 2016)
- 79 Katten Attorneys Selected for *Best Lawyers in America*® 2017 (August 15, 2016)
- Katten Private Wealth Practice Lauded in Inaugural *Chambers High Net Worth* 2016 Guide (June 24, 2016)
- Ronni Davidowitz Comments on IP Valuations (May 2, 2016)
- Katten Attorneys Ronni Davidowitz, Guy Dempsey, Christina Hassan and Floyd Mandell Receive 2016 Client Choice Awards (February 17, 2016)
- Twenty Katten Attorneys Recognized in 2015 New York Metro *Super Lawyers* List (September 16, 2015)
- 91 Katten Attorneys Recognized in *Best Lawyers in America*® 2016 (August 17, 2015)
- Ronni Davidowitz Discusses Establishing Private Foundations With *InvestmentNews* (March 19, 2015)
- Eighteen Katten Attorneys Named to 2014 New York Metro *Super Lawyers* List (September 23, 2014)
- 85 Katten Attorneys Named to *Best Lawyers in America*® 2015 (August 18, 2014)
- Ronni Davidowitz, Head of the New York Private Wealth Practice, Quoted in *Investment News* on Taxation of Stock Donations (August 12, 2014)
- Partner Ronni Davidowitz Comments on Trusts-Related Implications of American Taxpayer Relief Act of 2012 on CNBC.com (March 21, 2014)
- Partner Ronni Davidowitz Comments on Philip Seymour Hoffman's Will in *InvestmentNews* (February 20, 2014)
- Seventeen Katten Attorneys Named to 2013 New York Metro *Super Lawyers* List (September 18, 2013)

- 83 Katten Attorneys Lauded in *Best Lawyers in America*® 2014 (August 15, 2013)
- 80 Katten Attorneys Named to *Best Lawyers in America*® 2013 Guide (August 24, 2012)
- 75 Katten Attorneys Named to *Best Lawyers in America*® 2012 Guide (September 12, 2011)
- Partner Ronni Davidowitz Quoted in Tax Notes Today on Filing Deadline Delay (April 4, 2011)
- 70 Katten Attorneys Named to *Best Lawyers in America*® 2011 (August 9, 2010)
- 66 Katten Attorneys Named to 2010 List of *Best Lawyers in America*® (August 5, 2009)
- 50 Katten Attorneys Named to 2009 List of *Best Lawyers in America*® (September 23, 2008)
- 46 Katten Attorneys Named to 2008 List of *Best Lawyers in America*® (October 31, 2007)

Publications

- 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)
- *United States v. Byrum*: Too Good To Be True? (February 2017)
- 2016 Year-End Estate Planning Advisory (November 21, 2016)
- 2015 Year-End Estate Planning Advisory (November 23, 2015)

- The Surface Transportation and Veterans Health Care Choice Improvement Act of 2015: Important Changes Affecting Tax Filings for Individuals and for Trusts and Estates (August 20, 2015)
- Eight Key Estate Planning Opportunities Arising from the Supreme Court's Decision on Same-Sex Marriage (June 29, 2015)
- 2014 Year-End Estate Planning Advisory (November 26, 2014)
- Trusts and Estates Planning Opportunities Arising From Recent Changes to the New York Estate Tax and Trust Income Tax Regimes (April 9, 2014)
- The New York Non-Profit Revitalization Act of 2013 – Important Changes Affecting New York Nonprofit Entities and Charitable Trusts (February 24, 2014)
- 2013 Year-End Estate Planning Advisory (November 2013)
- Estate Planning Opportunities Arising from Recent Revenue Ruling Concerning Marriages of Same-Sex Couples (September 3, 2013)
- Estate Planning Opportunities Arising from Recent Landmark Supreme Court Decisions Concerning Marriages of Same-Sex Couples (June 28, 2013)
- Estate Planning After the Fiscal Cliff Deal (January 16, 2013)
- 2012 Year-End Estate Planning Advisory (November 20, 2012)
- IRS Releases Guidance on Foreign Financial Asset Reporting (February 1, 2012)
- Offshore Voluntary Disclosure Program Reopens (January 11, 2012)
- 2011 Year-End Estate Planning Advisory (November 23, 2011)
- Extension and New Guidance for the Voluntary Disclosure Initiative for Undisclosed Foreign Assets (June 10, 2011)
- House Votes 277-148 to Approve Senate Tax Cut Extension Bill (December 17, 2010)
- 2010 Year-End Estate Planning Advisory (November 2010)

- Important Changes to New York Not-For-Profit Corporation Law (October 14, 2010)
- 2010 Estate Tax Planning Strategies—Once-in-a-Lifetime Opportunities vs. Potential Traps for the Unwary (September 21, 2010)
- 2010 Revisions to New York Power of Attorney Statute Take Effect September 12 (August 24, 2010)
- HIRE Act Affects Foreign Trusts and Imposes Additional Requirements on US Persons with Foreign Accounts (March 24, 2010)
- New FBAR Guidance and Proposed Regulations Issued (March 4, 2010)
- US Government Acts Quickly to Help Haiti with Tax Benefits for Donors (February 2, 2010)
- Hooray, There's No Estate Tax: Now What Do I Do? (January 7, 2010)
- Possible One-Year Elimination of Estate and Generation-Skipping Transfer Tax in 2010: Going, Going, Gone? (December 23, 2009)
- 2009 Year-End Estate Planning Advisory (December 2009)
- IRS Announces One-Time Extension for Voluntary Disclosure (September 21, 2009)
- Power of Attorney Law Changes in New York on September 1, 2009 (August 27, 2009)
- IRS Extends FBAR Filing Date (August 12, 2009)
- Changes to New York Powers of Attorney Effective September 1 (July 28, 2009)
- IRS Temporarily Relaxes FBAR Filing Requirements for Non-US Persons (June 10, 2009)
- "FBAR" Filings Disclosing Foreign Accounts Due June 30 (May 12, 2009)
- 2008 Year-End Estate Planning Advisory (December 2008)
- New Expatriation Legislation Passed Unanimously by Congress and Signed by President (June 2008)
- Opportunities: Cloud Over Economy Creates Estate Planning Silver Lining (February 2008)

Presentations and Events

- ACTEC 2019 Mid-Atlantic Regional Meeting (September 13–15, 2019) | *Participant*
- The Latest Evolution in Tax-Efficient Investing for Sophisticated Investors, Family Offices, Wealth Advisors, Distributors and Alternative Asset Managers (October 29, 2018) | *Panelist*
- 2018 Annual Trust & Investment Conference (September 26–28, 2018) | *Presenter* | *Mitigating Fiduciary Risk and Litigation* | *New York Bankers' Association*
- Mitigating Fiduciary Risk (July 2018) | *Speaker*
- Mitigating Fiduciary Risk (June 2017) | *Presenter*
- Updates on Tax-Efficient New Products and Private Placement Products (January 10, 2017) | *Panelist*
- Mitigating Fiduciary Risk (September 29, 2016) | *Presenter*
- Taking a Fresh Look at Your Estate and Investment Plans in the New Year (January 12, 2015) | *Presenter*
- Post-Election Perspective: Planning for the Sunset of Tax Cuts (November 8, 2012) | *Presenter*
- Planning During Turbulent Times (April 26, 2012) | *Presenter*
- 42nd Annual Estate Planning Institute (September 12–13, 2011) | *Speaker* | *IRS vs. The Taxpayer Perspective*
- 41st Annual Estate Planning Institute (September 13–14, 2010) | *Speaker* | *FLPs and LLCs – Watching the Law Develop*
- Understanding Gift Taxes (March 15, 2010) | *Speaker*
- 2nd Annual Family Office Conference (March 3, 2010) | *Speaker* | *Philanthropy and the Family Office*

- Estate Tax Legislation - 2010 Is Here: What Now? (February 22, 2010) | *Panelist*
- 7th Annual Sophisticated Trusts & Estates Law Institute (November 19–20, 2009) | *Speaker* | *Charities and Options for Battered Endowments*
- Upcoming Estate Tax Legislation: What You Need To Know in 2009 (November 3, 2009) | *Panelist*
- Unlocking Your Value—Trusts and Estates: Securing Your Future in the Current Economic Environment (October 29, 2009) | *Panelist*
- 40th Annual Estate Planning Institute (September 14–15, 2009) | *Speaker* | *IRS vs. The Tax Payer Perspective*
- 2009 Annual Estate Planning Conference (July 14, 2009) | *Speaker* | *Estate Planning to Prevent Future Litigation*
- Estate Planning for the Middle Class Client (June 9, 2009) | *Speaker*
- Recent Developments in Estate Planning and Taxation (May 14, 2009) | *Speaker*
- Ninth Annual Westchester Chapter Tax, Estate, and Financial Planning Conference (May 1, 2009) | *Speaker* | *Estate Planning in a Down Economy*
- Understanding Estate, Personal, Gift & Fiduciary Income Tax Returns 2008 (December 11–12, 2008) | *Speaker*
- Estate Planning Institute 2008 (September 8–9, 2008) | *Speaker* | *IRS vs. the Taxpayer Perspective*
- 38th Annual Estate Planning Institute (September 10–11, 2007) | *Presenter* | *De-Coupling the Federal and State Estate Taxes*
- Trust Your Planning: A Comprehensive Review of Trust Planning and Drafting Techniques Seminar (May 30, 2007) | *Speaker*
- The New York State Bar Association's 2007 Annual Meeting (January 22–27, 2007) | *Chair* | *Navigating Charitable Waters: What Every Practitioner Needs to Know*