

Estate Planning Update for Same-Sex and Unmarried Couples

Published in *Estate Planning Journal*

November 2015

Joshua Rubenstein, national head of the firm's Private Wealth practice and national chair of the Private Client Services group, authored this article on the need to review estate plans in light of the Supreme Court's holdings in *Obergefell* and *Windsor*. Joshua discusses the demise of the Defense of Marriage Act (DOMA) and the resulting planning opportunities for same-sex couples. He also examines issues such as transfer taxes, gift techniques, guardianship, adoption, health care proxies, and assets that require special planning. He concludes by noting that when advising clients with nontraditional family circumstances, estate planners should closely review the clients' existing estate plans to determine if amendments are needed to satisfy the clients' needs and make the best use of changes in the law.

CONTACTS

For more information, contact your Katten attorney or any of the following attorneys.



Joshua S. Rubenstein

+1.212.940.7150

joshua.rubenstein@katten.com

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