



Joshua Rubenstein Featured in *Citywealth's* Quick Insights Series

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Joshua Rubenstein, partner and national chair of Katten's Private Wealth Department, was recently featured in *Citywealth's* Quick Insights Q&A series.

The Q&A explored the importance of navigating different family dynamics of each client and how that leads to Joshua tailoring his approach to each client. The process starts with a series of questions to evaluate the situation.

"That depends upon so many factors," Joshua started. "Is there a family office? If so, does the family office help or hinder the process? Is there one lawyer for the family, or do different family members use different lawyers (or does the family office itself use multiple lawyers)? Do you have a wide range of age diversity on your team, so that family members can form relationships with the team members they relate best with? Having a diverse team can be critical."

Communication is critical between Joshua and his clients as well as amongst members of the families he's working with.

"The first step is to remind the patriarch or matriarch that even if they are reserving all decisions to themselves, clearly communicating their decisions to everyone is crucial," Joshua said. "Most family disputes arise over surprise and disappointment — from a lack of clarity as to what the matriarch's/patriarch's true intentions were."

Joshua also talked about conflict management around wealth disagreements or management. He shared, "It is a mistake to force family members to remain economically tied to one another. Good family structures provide an exit mechanism for beneficiaries who want to separate."

["Family, Wealth, and the Power of Planning,"](#) *Citywealth*, April 30, 2025

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