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FIRM NEWS

Partner Joshua Rubenstein Quoted in *Financial Post* on Estate Taxes by State

March 22, 2011

Joshua Rubenstein, Chair of the firm's Trusts and Estates Practice, was quoted in an article in the *Financial Post* on estate taxes, which vary widely by state—leading some to consider moving and others to make lifetime gifts. Mr. Rubenstein notes that state estate taxes are generally deducted from the value of the estate before calculating federal estate taxes. He says that taxpayers should consider putting assets like homes in other states in qualified personal residence trusts, which give up ownership of the home and move it out of the estate, and then put it in a limited liability company to put it out of the reach of local state taxes. ("For death and taxes, Americans shop around," March 22, 2011)

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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