Partner Joshua Rubenstein Quoted in *New York Times* on Estate Tax Strategies

September 15, 2010

Joshua Rubenstein, Chair of the firm's Trusts and Estates Practice, was quoted in an article in the *New York Times* on tax planning strategies during a period of uncertainly about the federal estate tax. Some of the steps families can take include buying life insurance, lending money and creating a trust. Mr. Rubenstein says that a grantor retained annuity trust (GRAT) can be particularly useful for those who have portfolios of depressed stocks they expect to recover and can afford to give away the upside potential. He notes, however, that for the many retirees who only hold bonds, GRATs don't offer any benefit.

Mr. Rubenstein also says that a widow or widower who remarries gains the tax advantage available to all married couples and can leave an unlimited amount to the surviving spouse without estate tax applying. In the process, though, the remarrying widow or widower would lose the late spouse's Social Security benefits, he says. (“Devising Strategies While the Estate Tax Is in Limbo,” September 15, 2010)

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

Attorney advertising. Published as a source of information only. The material contained herein is not to be construed as legal advice or opinion.

©2026 Katten Muchin Rosenman LLP.

All rights reserved. Katten refers to Katten Muchin Rosenman LLP and the affiliated partnership as explained at katten.com/disclaimer.