

Amelia Renkert-Thomas

Of Counsel

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Education: Yale University, cum laude, B.A. • Harvard Law School, cum laude, J.D. • Case Western Reserve University School of Law, Taxation, recipient of the Richard A. Collier Award for Excellence in Taxation, LL.M.

Admitted: State of CT, 1989 • State of NY, 2005 • Registered Foreign Lawyer in the UK, 2007

Year joined: 2003

Year became partner: 2007



Overview

Amelia's practice focuses on tax-sensitive wealth planning for individuals, their families and their family offices. Utilizing trusts, partnerships and other entities, Amelia assists clients in developing structures to preserve and grow family assets, whether they be businesses, financial investments, real estate holdings or more unique assets such as horses, yachts and aircraft.

Central to Amelia's work with family groups is the development of multi-generational governance mechanisms to support and strengthen long-term family relationships, and planning for inter-generational transitions and succession.

Prior to joining Withers Bergman LLP in 2003, she served as President and CEO of a fifth-generation family business for 13 years.

Amelia also is knowledgeable in equine law, including matters related to buying, selling, breeding, training and competing equine athletes in racing, hunter-jumpers, eventing and dressage.

Highlights

- Ownership and management succession planning for founder of major regional commercial and residential real estate brokerage firm.
- Restructuring of family office for second generation real estate family, including implementation of multi-tiered tracking partnership to permit family members and trusts to hold varying percentages of portfolios holding real estate, public equities, debt securities, hedge funds and private equity investments.
- Development and operation of a "virtual" family office for two branches of a four generation family, including implementation of multi-tier investment holding structure; coordination of investment planning culminating in implementation of a diversified portfolio of public equities, fixed income securities, hedge funds and private equity investments; management of outside accounting services, including oversight of financial reporting and review of income tax returns; coordination of bill payment and concierge services.
- Design and implementation of coordinated estate plans for first, second and third generations of family with recently-diversified investment holdings, thereby reducing or eliminating estate and generation-skipping taxes on inter-generational transfers.
- Planning strategies included reorganization of legacy trusts to enhance family governance structure and redirect beneficial interests among generations, leveraged transfers to GST-exempt perpetual dynasty trust, split-dollar insurance planning.

Publications and speaking engagements

- Presenter, "Finding the Silver Lining: Opportunities in a Challenging Economy," presented by Withers Bergman LLP, Greenwich, CT and New York, NY, February/March 2009.
- Presentation on "Setting up and Running Family Offices Around the World-Understanding and Solving Cross Border Issues," London, October 2007.
- Presentation on "Why a Family Office?" at Withers Bergman LLP seminar Thinking of a Family Office? Greenwich, February 2007.
- Presentation on "Ownership Succession Planning," at Withers Bergman LLP seminar Keeping It in the Family, New York, November 2005 and Connecticut, March 2006.
- Presentation on "Installment Sales to Defective Trusts, Dispelling the Myths, Spelling Out the Opportunities," presented by Withers Bergman LLP, Connecticut, November and January 2004.
- Author of "Fifth-generation family secrets," Family Business, Spring 2004.
- Presentation on "Family Business Succession Planning," Coverings 2004 Conference, sponsored by National Trade Productions, Florida, March 2004.
- Author of "Planning for the Succession of Your Business Before It's Too Late," TileLetter, May, September and October 2003.

- Author of "Business Succession at Ironrock," TileLetter, October 2003.

Memberships

American Bar Association.

On a personal note

When she has a free moment, Amelia may be found in the barn with her horses.