Edward A. Renn

Partner

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Education: Syracuse University, B.A. • University of Connecticut School of Law with high honors, J.D.

Admitted: State of CT, 1988 • Registered Foreign Lawyer in the UK, 2002 • State of NY, 2004 • Washington D.C., 2003 • Commonwealth of MA, 2007

Year joined: 1991

Year became partner: 1998

Overview

Ed focuses on domestic and international private client matters. He provides legal advice on US and international estate planning, income maximization strategies, FLP and LLC planning, wealth preservation, business succession planning, international tax planning for entities and individuals, trust structures and estate administration.

A significant part of his practice focuses on domestic and international estate planning for hedge fund and private equity principals. Ed is a frequent speaker and has co-authored several books on estate planning for individuals.

Ed is admitted to practice in the United States Tax Court.

Publications and speaking engagements

Presentations:

- "Succession Planning for Business Continuity," Exit Planning Exchange Seminar, Stamford, CT, May 2011.
- "Unique Wealth Transfer Planning Opportunities for Fund Professionals in 2011 and 2012, Co-Presenter, Greenwich, CT, May 2011.
- "Window of Opportunity: Saving Taxes in 2011-2012 and Providing for Certainty with Succession Planning," Co-Presenter, Greenwich, CT, May 2011
- "Multi-Generational Wealth Planning, NY, March 2011.
- "Estate and Wealth Planning in 2011," IvyPlus Event, New York, NY, March 2011.
- "Finding and Working with Affluent Physicians," Co-Presenter, New York, NY, November 2010.
- "End-of-the Year Power Moves." Speaker, Inc. Magazine, Wayne, NJ and New York, NY, October 2010.
- "Marketing Life Insurance to the Financial Elite," Presenter, New York, NY, October 2010.
- "Estate Freeze Techniques for Family Businesses," Presenter, Merrill Lynch, New York, NY, September 2010.
- "Create a Multi-Family Office Practice," Presenter, Private Wealth, Chicago, July 2010.
- "Tax Efficient Hedge Fund Investing," Speaker, Family Office Association, Greenwich, July 2010.
- "Sourcing the Super-Rich for Life Insurance," Speaker, Rothstein Kass, New York, NY, June 2010.
- "Business Succession Planning," Speaker, Herald Bank, New York, NY, June 2010.
- "The Wealthy Family/Family Office Forum/PPLI," Presenter, IMI, Greenwich, June 2010.
- "Estate Planning," Presenter, CLE Presentation, Rothstein Kass, New York, NY, March 2010.
- "Trends in Family Office," Speaker, IvyPlus Event, New York, NY, March 2010.
- "International Aspects of Estate Planning," to the Lower Fairfield County Estate Planning Council, December 2009.
- "FLP Planning with GRATs and Defective Grantor Trusts," to financial professionals in Hong Kong and Singapore, May 2009.
- "Working with Family Offices," Connecticut Chapter of The Alliance for Alternative Asset Professionals, March 2009.
- "Wealth Planning for Hedge Fund Managers," to MARHedge World Wealth Summit, Bermuda, October 2006.
- "Family Offices and Trusts Tax Efficient Cross-Border Planning," to World Offshore Covention, Puerto Rico, October 2005.
- "Succession Planning for Family Offices," to Family Office Business Operations, New York, July 2005.

Articles:

- "Is the $5 Million Gift Tax Exemption Changing?" Withers Bergman LLP Briefing Notes, November 2011.

- "The estate planning philosophy of the self-made ultra-affluent," Forbes, July 2011.
- "Changes to Connecticut's Estate and Gift Taxes," Withers Bergman LLP Briefing Notes, May 2011.
- "Window of Opportunity to Save on Taxes by Implementing Business Succession Planning," Withers Bergman LLP Briefing Notes, April 2011.
- "A Two-Year Window," *Private Wealth Magazine*, March/April 2011.
- "Planning For The Modern Family-A Flexible Multi-Generational Approach to Preserving Wealth While Providing For The Family," *Private Wealth Magazine*, May/June 2009.
- Withers Bergman Newsletter "Anticipated U.S. Transfer Tax Legislation-The Times They are a Changin," March 2009.
- "FLP Care and Maintenance - Family Offices Are Well Suited For Administering Family Limited Partnerships," *Private Wealth Magazine*, December 2008/January 2009.
- "The Resurrection - How Holman Revived Section 2703 Arguments - long thought dead and buried - to defeat a family limited partnership," Trusts and Estates Magazine, October 2008.
- "Sharing the Wealth," *Private Wealth Magazine*, June/July 2008.
- "Passing the Baton-Succession Planning Among Ultra-High-Net-Worth Family Businesses," *Families in Business*, October 2007.
- "Section 2703-Keeping Buy/Sell Agreements Intact for Estate Planning and Succession Planning of Family Owned Businesses," *Insights Magazine*, Autumn 2007.
- "Beneficiary Withdrawal Powers in Grantor Trusts-A Crumm(e)y Idea?" *Estate Planning*, October 2007.
- "Eye of the Beholder," *Private Wealth*, August-September 2007.
- "Freeze Frame," *Private Wealth*, June-July 2007.
- "Intelligent Estate Planning for the Contractor The Business," Construction *Accounting and Taxation*, March/April 2007.
- "Defective Thinking," *Financial Advisor Magazine* , November 2006.
- "Intelligent Estate Planning for the Contractor The Client Picture," *Construction Accounting and Taxation*, October 2006.
- "Sabotaged Don’t Let a Buy-Sell Agreement Blow Up an Estate Plan," *Trusts & Estates Magazine*, April 2006.
- "Estate Planning for the Contractor," Construction, Accounting and Taxation, April 2006.

Books:

- "Protecting the Family Fortune," published 2008 by Campden Media.
- "Fortune’s Fortress A Primer on Wealth Preservation for Hedge Fund Professionals," *MARHedge Publication*, 2007.
- "Advanced Estate Planning," *Wealth Preservation for Physicians*, January 2006.

Memberships

- Connecticut Bar Association
- American Bar Association
- New York Bar Association
- District of Columbia Bar Association
- Society of Trust and Estate Practitioners (STEP)
- Member, Financial Planning Association

On a personal note

Edward is married with three children.