James R. Brockway

Partner and Joint Wealth Planning Practice Group Leader

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Education: Dartmouth College, summa cum laude, Phi Beta Kappa, A.B. • Duke University School of Law, J.D.

Admitted: State of MD, 1976 • State of CT, 1979 • Registered Foreign Lawyer in the UK, 2002 • Washington D.C., 2004 • State of NY, 2005

Year joined: 1979

Year became partner: 1984

Overview

Jim is co-chairman of the Wealth Planning practice group at the firm. His practice is global in scope with particular emphasis on offshore trust planning, planning for non-U.S. individuals and foreign assets, family investment and business planning, family offices and inbound and outbound business and tax planning.

He also advises on corporate and partnership tax planning for closely held businesses, investment entities and funds management entities as well as mergers and acquisitions and insurance and derivatives investment tax planning.

Jim has lectured before numerous professional groups on partnership, estate tax, life insurance and foreign investment planning issues and has written articles for professional journals and newsletters on various tax topics.

Highlights

- Co-author of "FATCA: The other shoe drops," Withers Bergman LLP Briefing Notes, February 2012.
- Presentation at JP Morgan Private Bank, "CLAT Planning with Insurance to Achieve Long-Term Income and Multi-Generational Tax Planning Objectives," December 2009.
- Presentation at MetCircle, "Tax Efficient Investing in Hedge Funds," New York, November 2006.
- Presentation at Life Insurance Finance Association Conference, "Use of Premium Financing in Tax Planning," New York, March 2006.
- Presentation at Withers Bergman LLP Annual Conference on Trust and Tax Planning, "Coming Here, but Being There Planning for the Cross-Border Client," New York, June 2004.
- Co-Author of "Insurance Solutions for International Estate Planning," Withers Bergman Tax Alerts, Winter 2003-2004.
- Presentation of "Tax Efficient Investment for Families," MGI 2nd Annual Global Family Office Conference, New York, April 2004.
- Presentation of "Insurance Solutions," Withers Bergman LLP annual conference on The Good, The Bad and the Ugly of International Trust and Tax Planning, New York, May 2003.
- Presentation at STEP Switzerland, "How to Use Partnerships and Foundations in a Compliant World," May 2011.

Publications and speaking engagements

Memberships

- American Bar Association
- Connecticut Bar Association
- New York State Bar Association
- Society of Trust and Estate Practitioners (STEP)

On a personal note

Outside of his practice, Jim enjoys golfing, skiing and kayaking.