Jay H. Rubinstein

Partner

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Education: Syracuse University, Accounting, B.S. • University of Hartford, Taxation, M.S. • Northeastern University School of Law, J.D.

Admitted: Commonwealth of MA, 1989 • State of NY, 1990 • State of CT, 1997 • Registered Foreign Lawyer in the UK, 2002

Year joined: 1995

Year became partner: 2002

Overview

Jay specializes in tax, estate and financial planning with an emphasis on international tax and trust planning. His practice provides counsel to clients on inbound and outbound investment and tax planning and corporate and partnership tax planning.

He advises non-U.S. clients with respect to U.S. tax consequences of private equity and hedge fund investments, as well as non-U.S. institutions as to U.S. tax compliance. Jay has been heavily involved in advising clients on the IRS Voluntary Disclosure programmes and HIRE Act.

Publications and speaking engagements

Jay is the author of many publications, including:

- Various Withers Briefing Notes
- Co-Author of "Fleece the Fleeing," *Trusts and Estates Magazine*, July 2008
- Co-Author of "Trusts for International Families," *New York Law Journal,* 13 February 2007
- Co-Author of "Clarifying Trusts, Creditors' Rights and the Related Tax Implications," *Trusts & Estates Magazine*, April 2003
- "Deductibility of Private Securities Partnership Expenses after Mayer," *Tax Notes*, March 1995.

He has also presented at conferences and conventions:

- "FATCA Update: Understanding the Impact of the New Proposed Regulations" briefings 6 March in Zurich and 7 March 2012 in Geneva.
- "Planning strategies for clients from Russia/CIS Focus: International Corporate Tax Structures" 27 September in Geneva and 28 September 2011 in Zurich.
- "The Old and New' (Recent tax and regulatory changes) conferences on 8 February in Zurich and 9 February 2011 in Geneva. The conference explored the latest developments in tax and securities law which affect private investors and their structures
- "Implication of the New US Withholding Tax Rules [FATCA] - The Trustee View," US Withholding Tax 2010, sponsored by IIR Conferences, London, 29 September 2010
- "US HIRE Act 2010" (Hiring Incentives to Restore Employment) conferences on 8 June 2010 in Geneva and on 9 June 2010 in Zurich. The conference focused on exploring the main aspects of the HIRE Act and it was presented by Withers LLP Wealth Planning team.
- "How to Structure Life Insurance Contracts for US Clients," Life Insurance and Tax Planning, sponsored by Academy and Finance, Geneva, 1 June 2010
- "Should I stay or should I go?" conference hosted in Geneva on 17 March 2010 and Zurich on 18 March 2010. This was presented by Withers LLP Wealth Planning team, commenting on global residency planning opportunities.
- "Can I Keep Control and Still Protect My Assets," Annual Family Office and Wealth Management Conference, sponsored by D.C. Finance, Tel-Aviv, 22 February, 2010
- "The Changing Offshore Industry," World Offshore Convention, San Juan, Puerto Rico, October 2004
- "Understanding Sharia Law," presented by Withers LLP Private Client Middle East and Far East Team, London, June 2004
- "International Trust Planning – Negotiating the Minefield for U.S. Beneficiaries and U.S. Investments," 2nd Annual Global Family Office Conference, sponsored by MGI and Withers Bergman LLP, New York, April 2004
- Presentations at both Withers Bergman LLP annual conferences, New York, May 2003 and June 2004.

Memberships

- Connecticut Bar Association
- New York State Bar Association
- Massachusetts Bar Association
- Society of Trust and Estate Practitioners