


## David Stein

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### David is a partner in the private client and tax team.

He is involved in tax, trust and estate planning for wealthy US and international families, with particular emphasis on planning for closely held businesses and investment vehicles. David's work for clients involves a range of matters, from creating tax-efficient wealth transfer structures to addressing income tax issues arising from investments and operating businesses.

In addition to helping families with their philanthropic endeavors, he also advises both public charities and private foundations on various matters, including tax exemption, tax aspects of operation and investments, and structuring of charitable gifts.

David has been featured as one of the 21 People to Know When Starting a Family Office by Business Insider and is a frequent speaker at professional and private family organization events on income tax issues, estate planning and charitable giving and has written on tax matters for various publications.

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### Talks

- *'[Legal issues faced by founders, entrepreneurs, executives and wealthy family members amid the coronavirus outbreak](#),'* Withers webinar - April 17, 2020, speaker
- *'Tax reform and the family office'*, Withers New York and Greenwich office event, June 2018
- *'Same, but different - A comparison of family offices around the world'*, Withers Singapore office event - April 9, 2018, speaker

- 'The Minefields of Estate Planning and Carried Interest', Bloomberg BNA Tax & Accounting Podcast, - September 2017, featured speaker

## External publications

- '[Here Are the 21 People to Know When Starting a Family Office](#),' Business Insider - July 13, 2021, quoted
- '[Life and law go on: How attorneys are working through New York City's lockdown](#),' Spear's - May 12, 2020, quoted
- '[Heirs of Ultra-Wealthy Can Profit Even When Markets Plunge](#),' - March 6, 2020, quoted
- '[Update on Connecticut estate and gift tax exemptions for 2019](#),' Withers article - February 15, 2019, quoted
- '[Family Offices: Business, Not Personal](#),' Wealthmanagement.com - June 11, 2018, quoted
- '[A Tax World Turned Upside Down For The Rich](#),' Financial Advisor Magazine - June 8, 2018, quoted
- '[How the New Federal and New York Estate Tax Exemption Could Affect Your Estate Plan](#),' Withers article - January 2018, co-author
- '[How the New Federal and Connecticut Estate and Gift Tax Exemption Could Affect Your Estate Plan](#),' article - January 2018, co-author
- 'Carried Interest Wealth Planning for the Global Fund Manager: An Introduction to Carry Planning and Implications in the International Context', Bloomberg BNA Tax Management Estates, Gift and Trust Journal, August 2016
- 'Tread Carefully', STEP Journal, May 2015, co-author
- 'Unique Wealth Transfer Planning Opportunities for Fund Professionals in 2011 and 2012', Greenwich, CT, May 2011
- 'An alternative to the vertical slice', Private Asset Management, April 2011
- 'Non-Vertical Carried Interest Transfer Planning An Alternative to the Vertical Slice', Private Asset Management, March 2011
- 'UBIT Issues in Investment Partnerships What Tax-Exempt Investors (and Their Taxable Partners) Should Know', Tax Planning for Domestic and Foreign Partnership, LLCs, Joint Ventures and Other Strategic Alliances, Practising Law Institute, 2004-2011
- 'Going Non-Vertical with Fund Interests - Creative Carried Interest Transfer Planning When The 'Vertical Slice' Won't Cut It', Trusts and Estates Magazine, November 2010.
- 'Economic Turmoil Creates Unprecedented Planning Opportunities for Principals of Investment Funds', Withers Bergman LLP Briefing Notes, January 2009
- 'A Tale of Two Systems', Legal Week, March 2005

## Admissions

- State of New York, 1999
- State of Connecticut, 2005
- Registered Foreign Lawyer in the UK, 2005
- State of California, 2012

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## Education

- New York University School of Law, J.D. magna cum laude, Order of the Coif, Law Review
  - Yale University, B.A. cum laude
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## Languages

## Memberships

Government Relations Committee, Non-Profit Coordinating Committee of New York

Board of Directors, International Festival of Arts and Ideas

Board of Directors, Hamptons Shakespeare Festival

New York State Bar Association

American Bar Association

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## Key dates

Year joined: 2004

Year became partner: 2005

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