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

He has extensive experience in federal and state income, estate and gift taxation. With David's wide range of business and financial knowledge, his clients look to him to apply his experience to structure complex business transactions and relationships and solve a variety of business-oriented problems while utilizing the benefits of trust, estate and tax planning.

David's clients include investors, entrepreneurs, senior level executives, family offices and fund managers and principals. His practice includes structuring investments and acquisitions, asset protection and preservation, and trust and estate planning. These issues generally involve coordinating income tax issues, estate and gift tax issues and many other concerns in one comprehensive plan to maximize the benefit for clients as they address the myriad of issues that face high net worth individuals and their families.

David is a Fellow of the American College of Tax Counsel, an organization in which membership is an honor reserved for those at the top of the tax profession. The College's members, called "Fellows," are recognized for their extraordinary accomplishments and professional achievements and for their dedication to improving the practice of tax law.

He lectures frequently on a variety of tax areas, including individual income and estate tax planning as well as corporate and business tax issues.

David is regularly quoted in the Wall Street Journal, Hearst Publications and various other professional journals and newsletters.

Talks

- '*Tax Treatment of Carried Interest: IRS Regs and Strategies for Tax, Private Equity, Real Estate Professionals,*' Strafford webinar - February 27, 2024, speaker
- '*Tax Issues and Planning Considerations for U.S. Executives,*' Strafford Webinars - April 4, 2023, speaker
- 'Checklist 2020: Moving forward,' Withersworldwide webinar - November 10, 2020
- '*The Kaestner Case and Surveying Recent Developments in Income Tax Jurisprudence,*' Wilmington Tax Group, Wilmington, Delaware - September 2019
- '*Tax Treatment of Carried Interest: Planning Opportunities for Tax, Private Equity and Real Estate Professionals*', Strafford Publications - July 2018, updated August 2019, webinar
- '*Can social impact investments have substantial returns?*' , Greenwich, April 2016
- '*Tax Planning Ideas 2019,*' The Howard H. Hinds Million Dollar Round Table, April 2019
- '*To give or not to give? Overcoming client myths about the 2012 gift tax*', Inside the Entrepreneurial Mind Monthly Breakfast Series, Greenwich, CT, November 2012
- '*Tax incentives for businesses*', Greenwich Chamber of Commerce Business Roundtable, February 2010
- Greenwich Entrepreneur Radio Program, WGCH 1490 AM (Greenwich)
- '*Considering a sale of your family business*', Greenwich, October 2009
- '*Americans abroad successfully moving people, money and businesses out of the US*', Withers Bergman LLP Annual International Trust and Tax Planning Conference,New York, June 2005
- '*Instalment sales to defective trusts, dispelling the myths, spelling out the opportunities*', Withers Bergman LLP, Connecticut, January and November, 2004

External publications

'*Retroactive Tax Hikes Seen as Unlikely Under Biden Administration,*' Tax Notes - November 11, 2020, quoted

'The Art of Passing Down Heirlooms,'"s PENTA - March 28, 2020, quoted

'Hoping to Save on Your 2019 Taxes? Time is Running out,' CNBC.com - November 17, 2019

'4 State Tax Cases to Watch at the US Supreme Court.' Law360 Tax Authority - September 23, 2019, quoted

'How Far Can States Go After Wayfair? "Not This Far"', Accounting Today - August 2019, quoted

'How Wealth Accumulators Can Use Trusts To Avoid State Income Tax,' Forbes - July 22, 2019, quoted

'Supreme Court finds North Carolina can't tax trust income,' Tax Notes - June 24, 2019, quoted

'Supreme Court's Ruling In Trust Case Shows Wayfair's Limits,' Law360 Tax Authority, June, 2019, quoted

'North Carolina's position on trust questioned,' Tax Notes - April 17, 2019, quoted

'Supreme Court hears arguments on major state trust tax case,' Accounting Today - April 17, 2019, quoted

'Update on Connecticut estate and gift tax exemptions for 2019,' Withers article - February 15, 2019, co-author

'Stan Lee's tangled web of estate planning and how to avoid this mess,' MarketWatch - November 14, 2018, quoted

'Madonna's lost love letter should be lesson to advisors,' Private Wealth - May 15, 2018, quoted

'Taxing collectibles: what you need to know,' Barron's PENTA - March 25, 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,' Withers article - January 2018, co-author

'4 ways tax reform may affect the sports world,' Law360 - January 02, 2018, co-author

'Property Rounds: Brokers, homeowners watching tax reform carefully,' NewsTimes - November 15, 2017, quoted

'Exploring tax and estate planning for watch collectors,' Haute Time - November 14, 2017, quoted

'Wealthy benefit from estate tax changes, AMT repeal in House Bill,' Bloomberg BNA - November 03, 2017, quoted

'Paul Newman's Rolex watch sells for record $17.6 million,' Private Wealth - October 27, 2017, quoted

Admissions

State of Connecticut

State of New York

State of Florida

US District Court (CT)

US Tax Court

US Supreme Court

Registered Foreign Lawyer in the UK

Education

Fairfield University, B.S. Accounting

Georgetown University Law Center, J.D.

New York University School of Law, LL.M. Taxation

Languages

English

Memberships

American Bar Association

American College of Tax Counsel

New York Bar Association (Tax Section, Trust and Estates, Entertainment, Sports, Arts Law)

Florida Bar Association (Tax Law, Real Property, Probate Law, Entertainment Arts and Sports)

Connecticut Bar Association (Estates and Probate, Tax, Sports and Entertainment)

Key dates

Year joined: 2004
Year became partner: 2004

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