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Constance Shields

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

She focuses on trusts and estates, and business succession matters for wealthy individuals and their families. Constance works with trusts and related business structures to preserve, protect and grow family wealth for multiple generations in a tax-efficient manner.

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ADMISSIONS

- State of Connecticut, 2003
- State of New York, 2004

PUBLICATIONS

'Tiered Structures for Family Office Operations: Integrating a Private Trust Company with a Family Office,' Probate & Property - September/October 2019, co-author

'The New Hampshire Foundation Act: A solid foundation for wealth management on a global scale,' Bloomberg BNA Estates, Gifts & Trusts Journal - March 7, 2019, co-author

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

'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

'2017 on track to be banner year for expatriations,' Bloomberg BNA Daily Tax Report - December 7, 2017, co-author

'On the Move: Promotions, New Hires & Advancements,' New Haven Register - July 30, 2017, featured

'Why the Granite State Rocks at Trust Administration Estate Planning', Estate Planning - June 2016, co-author

'How the 'Rich Kids of Instagram' Create Poor Security Risks,' Estate Planning Journal - April 2014, co-author'

International Bar Association, Individual Tax and Private Client Committee, International Estate Planning Guide - United States' - 2014, co-author

'Dynasty Trusts Pass Wealth Tax-Free to Heirs,' The Commercial Record - May 2012

'Charitable Cap Adjustment Clauses: Best Suited for Inter Vivos Transfers' , New York Law Journal - April 2012, co-author

MEMBERSHIPS

- New York State Bar Association

- Connecticut Bar Association

TALKS

'Onboarding a New International Client,' Delaware Trust Conference, Delaware - October 2018

'Fundamentals of Post-Mortem Administration,' ABA Seminar - March 2018

'Fiduciary Income Tax Issues, with a focus on the Grantor Trust Rules,' CBA Estate and Probate Section Meeting - March 2017

'Business Succession Planning,' Federal Tax Institute of New England - November 2016

'New Hampshire Trusts,' ABA Section of Taxation and the Trust and Estate Law Division of the ABA Section of Real Property, Trust and Estate Law Joint Fall CLE Meeting*,* Boston - October 2016

'Why the Granite State Rocks at Trust Administration,' ABA Tax Section Joint Fall Meeting - September 2016

'Ethical Issues Arising in the Context of International Tax Planning'" ABA Tax Section - January 2016

'The Future of Wealth Structuring & Planning,' 2015 DELTEC Round Table Conference, Nassau Bahamas - January 2015

'Conflicts of Interest, Professionalism and Practice Management' Osgoode, Toronto, Canada - October 2014

'The Probate Process From Start to Finish,' IPE Seminar - April 2013

'Drafting Effective Wills and Trusts,' NBI Seminar - June 2012

'New Frontiers in Estate Planning: Changing Laws and the Modern Family,' The Woman's Club of Greenwich - January 2012

EDUCATION

Lawrence University, B.A.
Pace University School of Law, cum laude, J.D.

LANGUAGES

ENGLISH

DATES

JOINED: 2007
PARTNER: 2017

New Haven
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Greenwich
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