

David A. Stein

PARTNER | SAN FRANCISCO, NEW YORK, NEW HAVEN

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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 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.

SECRETARY **BETH PARMELEE**

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ADMISSIONS

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

PUBLICATIONS

'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

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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

TALKS

'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

EDUCATION

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

LANGUAGES

ENGLISH

DATES

JOINED: 2004
PARTNER: 2005

RECOGNITION

2018 Chambers HNW Leading
Individual - David Stein

2017 AV rating -
Reynolds

2017 Chambers HNW -
INDIVIDUAL

2016 AV rating - Stein

2016 City Wealth Leaders List -
Recommended

2016 Chambers
HNW - Ranked In

2016 Chambers HNW - Top
Ranked Withers LLP

2015 Citywealth Leaders List
- Recommended

2014 Citywealth Leaders list
Recommended

San Francisco

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New York

430 PARK AVENUE, 10TH FLOOR, NY 10022-3505

New Haven

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