


Ivan A. Sacks

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

He is a private client lawyer and trusted advisor to international and domestic families and family offices. Ivan heads the Withers Families and Family Office group, is a member of the firm's Latin American and Asia-Pacific groups and was also global chairperson of Withersworldwide from July 2013 to July 2019.


Both in the US and in an international context, he counsels families and entrepreneurs on the structuring of their closely held business interests, family offices and charitable foundations, the design and administration of trusts and estates, and comprehensive risk management, governance and succession planning. He also frequently advises banks and trust companies on fiduciary matters.

Ivan is admitted to the bar of the State of New York and the Federal District Court for the Southern District of New York. He graduated from Columbia Law School, where he was a Harlan Fiske Stone Scholar, a Charles Evans Hughes Fellow and Editor-in-Chief of the Columbia Human Rights Law Review. He is an active member of several bar associations and speaks frequently on topics related to wealth planning.

He is the global head of Withers *Pro Bono* programs and serves as a director or other fiduciary for a number of private enterprises, trusts and charitable organizations. Among publicly acknowledged roles, he is Chairman of the Jose Limon Dance Foundation, Chairman of the International Patrons of the Duomo, and Trustee of the Brugnaro Blind Trust for the Mayor of Venice, Luigi Brugnaro.

Ivan is listed in America's Best Lawyers, New York Super Lawyers, *Legal Week's* Private Client Global Elite, *Chambers and Partners*, and Citywealth Leaders Lists, among others.

SECRETARY **ROSA MARRERO**

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ADMISSIONS

- State of New York, 1993
- Southern District of New York, 1994
- Registered Foreign Lawyer in the UK, 2003

PUBLICATIONS

'The Complete Family Office Handbook: A Guide for Affluent Families and the Advisors Who Serve Them' 2nd Edition, 'Wiley' - November 2020, chapter co-author

'Global Law Firm Withers' Family Office Group Advises Ultra-Rich,' Bloomberg Law - June 25, 2019, quoted

'Growing Withers Names Switzerland Partner Next Chair,' The American Lawyer, May, 2019

'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

'Tax Cuts for Small-Business Owners? It's Complicated.' The New York Times - November 17, 2017, quoted

'Cuba: Fine to stormy.' Offshore Investment - July/August 2017, co-author

'When Heirs Fight Over Assets With Sentimental Value.' The New York Times - April 4, 2015, quoted

MEMBERSHIPS

- Association of the Bar of the City of New York

- Society of Trust and Estate Practitioners

- New York State Bar Association

TALKS

Speaker, 'Key Considerations in Setting Up a Family Office.' ABA (RPTE) Presentation - June 29, 2021

Speaker, 'Who Should Own and Operate a Family Office and Ideal Structures.' Tamarind Learning Podcast Series - November 10, 2020

Speaker, 'Family Office Set-up, Structure, and Compliance.' Tamarind Learning Podcast Series - November 9, 2020

Host, 'Withers talks: families and family office | Ep 7 - Family offices as direct investors.' Withersworldwide podcast - October 8, 2020

Host, 'Withers talks: families and family office | Ep 6 - Sibling rivalries in family businesses.' Withersworldwide podcast - October 1, 2020

Host, 'Withers talks: families and family office | Ep 5 - Asset protection for children including trusts and prenups.' Withersworldwide podcast - September 24, 2020

Host, 'Withers talks: families and family office | Ep 4 - Moving trusts.' Withersworldwide podcast - September 17, 2020

Host, 'Withers talks: families and family office | Ep 3 - Opportunities for planning in a low interest environment.' Withersworldwide podcast - September 10, 2020

Host, 'Withers talks: families and family office | Ep 2 - Employment agreements, and incentives for performance and retention.' Withersworldwide podcast - September 3, 2020

Host, 'Withers talks: families and family office | Ep 1 - Structuring family offices for tax and investment benefits.' Withersworldwide podcast - August 27, 2020

Speaker, 'Looking Ahead: Identifying opportunities with intra-family loans.' Withersworldwide webinar - June 22, 2020

Moderator, 'COVID-19 Update: Economic outlook and the impact of changing travel restrictions and immigration policies.' Webinar with Goldman Sachs and Withersworldwide - May 21, 2020

Speaker, *Attitudes to wealth - Family offices and better uses of wealth*, Withers London event - September 17, 2019

Panelist, *'Global Leaders Forum On Future Directions'*, Global STEP Conference, Vancouver - September 2018

Moderator, *'Tax reform and the family office'*, Withers New York event - June 2018

Speaker, *'Scaling global - The law of the land'*, HSBC and Slate Studios podcast - November 2017

Panelist, *'The Future of Income and Inheritance Taxation for Wealth Structures in Latin America'*, 22nd International Trust and Tax Planning Summit, Miami FL - November 2013

Panelist, *'360 View of Banking For Latin Clientele'*, STEP Latin America Annual Conference, Montevideo, Uruguay - October 2013

Speaker, *'The Use of International Legal Structures For Family Governance'*, Itau Unibanco Wealth Across Generations Conference, Sao Paulo, Brazil - September 2013

Keynote speaker, *'FATCA Overview and Update on the Latest Issues'*, STEP Brazil inaugural meeting, Sao Paulo - March 2013

Speaker, *'It's Not Your Grandpa's Trust Anymore'*, NMS Family Office Forum, Palm Beach - March 2013

Speaker, *'Around the World in 70 Minutes'*, STEP Boston and STEP New York - February 2013

EDUCATION

Columbia College, B.A.
Columbia Law School, Harlan Fiske Stone Scholar, J.D.

LANGUAGES

ENGLISH

DATES

JOINED: 2003
PARTNER: 2003

RECOGNITION

2022 Best Lawyers Ivan Sacks	2021 Chambers Ivan Sacks	2021 Best Lawyers US Recognized Ivan Sacks	2021 Best Lawyers in The New York Times Recognized Ivan Sacks
2020 Chambers HNW US Ranked Ivan Sacks	2020 Best Lawyers US Recognized Ivan Sacks	2019 Whos Who Legal Private Client US Recognized Ivan Sacks	2019 Legal Week US Private Client Global Elite Ivan Sacks
2019 Chambers HNW Ranked Ivan Sacks	2019 Best Lawyers US Recognized Ivan Sacks	2018 Super Lawyers US Rising Star Ivan Sacks	2018 Chambers HNW Ranked Ivan Sacks
2018 Best Lawyers US Recognized Ivan Sacks	2017 Legal Week US Private Client Global Elite Recognized Ivan Sacks	2017 Chambers HNW Leading Individual Ivan Sacks	2017 Best Lawyers US Recognized Ivan Sacks
2016 Citywealth Leaders List Recommended Ivan Sacks	2016 Chambers HNW Leading Individual Ivan Sacks	2015 Citywealth Leaders List Recommended Ivan Sacks	2014 Citywealth Leaders List Recommended Ivan Sacks

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