

As personal, family and business ties between the United States and Israel continue to grow, individuals and families increasingly require sophisticated legal and tax planning that takes into account both jurisdictions. The **Duane Morris U.S.-Israel Private Client Initiative**, led by **Amy J. Guss** and **David S. Kovsky**, provides integrated U.S. gift and estate tax planning and international tax advice to individuals, families, entrepreneurs and family offices with a nexus to both the U.S. and Israel.

Our practice focuses on clients whose lives, families, businesses and assets have cross-border considerations, including:

- U.S. citizens with children or other family members who have made Aliyah or reside in Israel;
- Dual U.S.-Israeli citizens seeking coordinated U.S. and Israeli estate and tax planning;
- Israeli individuals and families relocating to or investing in the U.S.;
- Israeli resident individuals who own U.S. real estate, business interests or other U.S.-situs assets that may be subject to U.S. estate and gift taxation;
- Entrepreneurs, business owners and family offices with assets in both countries; and
- Families undertaking intergenerational wealth transfers involving U.S. and Israeli family members.



Amy and David bring complementary experience in sophisticated gift and estate tax planning, wealth transfer planning, business succession and international tax planning. The team advises clients on U.S. estate and gift tax exposure, trust planning, ownership of U.S. assets, pre-immigration planning, business succession, charitable planning and the administration of estates and trusts involving U.S. and Israeli connections.

COORDINATED U.S.-ISRAEL COUNSEL

Cross-border planning is most effective when U.S. and Israeli advisers work together. We collaborate closely with a client's existing Israeli attorneys, accountants, tax advisers and other professional advisers, coordinating the U.S. aspects of a broader cross-border strategy while respecting and incorporating the client's established advisory relationships.

For clients who do not already have Israeli counsel, we can also help connect them with experienced Israeli professionals through our network of trusted strategic relationships, so they can choose the professional who best suits them. This allows us to build a coordinated U.S.-Israel advisory team tailored to the client's particular circumstances and objectives.

We strive to provide seamless, practical and sophisticated advice that helps clients preserve wealth, manage tax exposure and plan successfully across generations and jurisdictions.

In addition to our robust presence in New York, Pennsylvania and New Jersey, we also have strong capabilities in Florida, Delaware and California.

FOR MORE INFORMATION, PLEASE CONTACT:



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