

# Wealth Management – Chambers USA 2010

June 11, 2010

Nationwide

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Wealth Management

## Band 2

The Firm: Traditionally strong in New York and Florida, this firm's trusts and estates practice continues to broaden its national reach, with a new team in Los Angeles. The group assists with the full range of wealth management matters and has a number of experienced litigators. Recently, it represented Lehman Brothers Trust Company, in the organization's capacity as a personal representative of a large estate, in litigation involving certain testamentary instruments. The group has also made a name for itself representing high-profile entertainers, along with the estates of Keith Haring, George Balanchine and Leonard Bernstein.

Sources Say: *"The firm is becoming a real leader in the area of estate planning. The attorneys are knowledgeable, creative, attentive, and very much focused on doing the best for their clients."*

Key Individuals: David Pratt is based in Boca Raton and concentrates his practice on the areas of trusts and estates, gift and generation-skipping transfer, and fiduciary and individual income taxation. He is also sought out for his expertise in post-mortem tax planning and asset protection. Jay Waxenberg operates out of New York and is chair of the personal planning department. A highly regarded practitioner, he has substantial experience of life insurance planning and is an esteemed member of the firm's fiduciary litigation group. Interviewees describe him as *"approachable and easy to get along with. He's cool, calm, and never rushed. He really empathizes with his clients and he's able to set them at ease."* Albert Gortz works out of the Boca Raton office and focuses on gift, estate and generation-skipping tax planning. He is praised as *"innovative, smart and keenly attuned to his client's needs."*

Related Professionals

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- **Jay D. Waxenberg**  
Partner
- **Albert W. Gortz**