Meredith M. Mazzola

Partner
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201-498-8515

Hackensack, NJ

Practice Areas

Estates & Trusts

Admitted

California
New Jersey
New York
New York State Supreme Court - Appellate Division
United States Supreme Court
United States Tax Court

Education

New York University, LL.M., Taxation
California Western School of Law, J.D., *cum laude*
The State University of New York at Buffalo, B.S., Sociology, *cum laude*

Meredith concentrates her practice in the areas of estate and tax planning, and estate and trust administration. She represents and advises high-net-worth individuals, closely held businesses, individual and corporate fiduciaries, and nonprofit and charitable entities. Meredith handles lifetime and end-of-life planning and related document preparation, including Wills, Trusts, Powers of Attorney, and Advance Directives, as well as lifetime giving, business succession, and charitable planning matters. She also provides counsel regarding estate and income tax saving techniques, and where needed represents clients in audits and tax appeals.

In the area of estate administration, Meredith represents fiduciaries and beneficiaries in probate matters, including intestacy proceedings, probate of Wills, marshaling estate assets and providing an inventory, the satisfaction of federal and state tax obligations, the preparation of petitions and supporting documents, and the settlement of complex estates, including probate litigation involving contested wills and fiduciary accountings.

Meredith also handles international tax matters, including inbound and outbound income, gift and estate tax planning, and issues relating to controlled foreign corporations, passive foreign investment companies, permanent establishment and treaty benefits. Additionally, she provides tax planning for high-net-worth individuals with closely held businesses or equity compensation.

Representative Experience

- Restructured non-resident multi-million dollar U.S. holdings to avoid millions in potential U.S. estate taxes.
- Structured sale of $9,000,000 vacation home through Charitable Remainder Trust to save significant income and estate taxes netting the donor a greater benefit while accomplishing their charitable goals.
- Structured sale of privately-held company to maximize income and estate tax savings.
- Settled Tax Court case involving estate tax valuations issues.
- Acted as primary tax counsel for an emerging Swiss tech company in structuring the acquisition of $40 million dollar U.S. tech company.

Articles and Presentations

- Practical Law Private Client Guide, Executive Transfers to the United States: Planning and Avoiding Pitfalls, Thomson Reuters (2017)

- What Advisors to HNW Foreign Investors Should Know About Investment-Related Immigration and Tax issues in the U.S., PAM Breakfast Briefings (2014)
- Protecting Your Ideas – What Should You Do, New York City Comic Con (2014)
- Starting a Business in the United States, Mid-Sweden Chamber of Commerce (2014)
- Business, Investment and Immigration Strategies in the U.S., CIS Wealth Conference & Expo – St. Petersburg (2014)
- What Should I Do?: The Legal Aspects of Making You and Your Business Famous, New York Comic Con (2013)
- Starting a Business in the United States, Young Entrepreneurs of Sweden (2013)