ARCHER & GREINER PC ATTORNEYS AT LAW

Martyn S. Babitz

Of Counsel

Private Wealth, Estates & Trusts

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Overview

Marty focuses his practice on sophisticated estate, tax, wealth transfer, and philanthropic planning for individuals, families, and closely held business owners. He advises clients on all aspects of wealth transfer, including the design and implementation of strategies to mitigate income, estate, gift, and generation-skipping transfer taxes.

Marty works closely with high-net-worth individuals and multigenerational families to develop tailored plans that preserve wealth, facilitate efficient succession, and achieve long-term personal and financial objectives. His practice includes business succession planning, charitable and philanthropic structuring, and the integration of estate planning with broader investment and governance strategies.

Marty is known for delivering practical, forward-thinking guidance that aligns complex tax considerations with each client's unique goals.

In addition, Marty counsels closely held business owners on tax-efficient pre-sale planning. He is involved in merger and acquisition matters, providing strategic tax and related planning guidance, working alongside clients and their advisors through liquidity events to optimize outcomes and minimize tax exposure.

Marty began his career in private legal practice, developing a strong foundation in estate planning, estate administration, and business and tax matters at regional law firms, including Archer's trusts and estates and tax groups, and through his own firm. He later transitioned into senior wealth planning, strategy, and leadership roles at prominent financial institutions, including BNY Wealth, Hawthorn, PNC Family Wealth, Brown Brothers Harriman, and PNC Wealth Management, where he advised high-net-worth individuals, families, and business owners on complex wealth transfer and succession strategies and worked closely with investment and private banking professionals to deliver integrated wealth management solutions.

With almost four decades of experience spanning legal practice and wealth management, Marty brings a distinctive, practical perspective on the intersection of estate planning, tax strategy, and wealth management. He has returned to Archer with this depth of experience, enabling him to provide comprehensive, strategic guidance in navigating complex estate, tax, and business planning matters.

Marty is a frequent speaker and has published numerous articles on estate planning and tax matters in national and regional publications, including Estate Planning, the Journal of Practical Estate Planning, the New Jersey Law Journal, and the Philadelphia Estate Planning Council Newsletter.

Select Speaking Engagements and Seminars

- "Key Points from the Heckerling Institute on Estate Planning"
    - Estate and Financial Planning Council of Southern New Jersey (2022-2026)
    - Bucks County Estate Planning Council (2024-2026)
    - Mercer County Estate Planning Council (2025)
    - Philadelphia Bar Association, Probate Section (2025)
- "Recent Developments and Planning Opportunities with Qualified Small Business Stock," U.S. Law Firm Group, Trusts and Estates Section (2025)
- "Pre-Sale Wealth Transfer Strategies for Business Owners"
    - Exit Planning Exchange (XPX) (2023, 2025)
    - Philadelphia Bar Association, Young Lawyers Division (2024)
    - ASPIRE Philadelphia Conference (2019)
    - D.C. Estate Planning Institute (2018)

Credentials

Education

- University of Pennsylvania Carey Law School, JD
- Villanova University, MA
- University of Pennsylvania - The Wharton School, BS

Admissions

- New Jersey
- Pennsylvania

Offices

- Voorhees, NJ