ARCHER & GREINER PC ATTORNEYS AT LAW

Tara Hagopian Zane

Partner

Private Wealth, Estates & Trusts /

Estate & Trust Litigation

856.354.3088

tzane@archerlaw.com

Overview

Tara is Co-Chair of Archer's Private Wealth, Estates & Trusts Group, and a member of the firm's Estate and Trust Litigation Group. She works with families and individuals in all areas of estate planning, estate and trust administration, and estate and trust litigation. Her deep experience where these areas intersect allows her to better serve her clients. Utilizing diverse techniques and planning tools, Tara has helped many clients implement estate planning, transfer tax planning, and business succession planning of the most sophisticated order.

Tara's estate planning services include lifetime and end-of-life planning and related document preparation such as Wills, Trusts, Powers of Attorney, and Advance Directives, as well as lifetime giving, business succession, and charitable planning matters. She also provides comprehensive and tailored administration services. She represents families with complex estate and trust administration issues, including those with complicated tax matters or related litigation. She also represents individuals and corporate fiduciaries who serve as Executor, Trustee, and Guardian.

A self-described people person and problem-solver, Tara prides herself on serving as a trusted advisor to her clients and their families, frequently extending her relationships to multiple generations of family members. She treats each client's situation as unique, and by fostering meaningful relationships and personal connections, she is able to provide the help and counsel best suited to each client's needs. Clients trust that she will skillfully guide them through the legal complexities of sensitive personal and family issues with compassion and empathy. She knows how to listen and she helps her clients and their families navigate difficult issues by providing practical and creative solutions to complex problems.

Representative Experience

- Obtained a private letter ruling from the IRS on a generation-skipping transfer tax issue in accordance with the settlement of litigation.
- Served as counsel for beneficiaries and fiduciaries in the modification and termination of trusts under the Uniform Trust Code, with and without court approval.
- Represented corporate trustees in the modification of charitable trust documents to comply with private foundation and related rules.
- Handled the complex administrations of spouses who died intestate -- the survivor leaving over three dozen heirs, multiple years of unfiled and unpaid income taxes, and assets in multiple jurisdictions.
- Successfully negotiated the settlement of a matter involving the dispute between siblings of pre-death transfers made by a deceased parent.

Professional and Community Involvement

- Mid-Atlantic Fellows Institute Class of 2022-23 of The American College of Trust and Estate Counsel
- American Bar Association
- New Jersey Bar Association
- Pennsylvania Bar Association
- Camden County Bar Association– Probate & Trust Committee
- Burlington County Bar Association – Probate & Trust Committee
- Society of Financial Service Professionals – South Jersey Chapter
- Estate and Financial Planning Council of Southern New Jersey

Select Articles

- "Challenges for Probate Judges: Trust Investments and Diversification," *National College of Probate Judges Fall Journal* (2020)

Select Speaking Engagements and Seminars

- " Estate Planning & Probate Ethics: Who Is Your Client?" National Business Institute (September 2024)
- "Estates of the Rich and Famous: Infamous Lessons," Archer 11th Annual Estate Litigation Seminar (September 2023)

- “Business Succession Planning,” Greater Hammonton Chamber of Commerce (April 2023)
- “9th Annual Estate Litigation Seminar” (October 2021)
- “Year-End Tax Planning Webinar,” Catholic Charities Diocese of Trenton (December 2020)
- “19th Annual Forum: Hot Trends in Estate Litigation,” Camden County Bar Association (December 2020)
- “8th Annual Estate Litigation Seminar” (September 2020)
- “Wills and Estate Planning Workshop,” Samaritan Healthcare & Hospice (September 2019)
- “Ethics in Estate Planning: Putting Testimony to the Test,” Archer 7th Annual Estate Litigation Seminar (April 2019)
- “Ethics in Estate Planning,” Archer 6th Annual Estate Litigation Seminar (May 2018)
- “Collaborative Planning for Closely-Held Business Owners and Their Families – A Case Study” (November 2017)
- UTC Case Study Presentation (January 2017)

Credentials

Education

- Villanova University Charles Widger School of Law, LLM, Taxation
- Boston College Law School, JD
- Villanova University, BA

Admissions

- New Jersey
- Pennsylvania
- U.S. District Court for the Eastern District of Pennsylvania
- U.S. Tax Court

Offices

- Voorhees, NJ

Areas of Focus

Practice

- Business Succession Planning
- Charitable Gift Planning
- Elder Law
- Estate & Trust Administration
- Estate & Trust Litigation
- Estate Planning
- Income, Estate & Gift Tax Planning
- International Estate & Income Tax Planning
- Private Wealth, Estates & Trusts

Industries

- Financial Institutions