Meredith M. Mazzola

Partner

Private Wealth, Estates & Trusts

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Overview

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.

Select Speaking Engagements and Seminars

- "10th Annual Estate Litigation Seminar," Archer & Greiner, P.C. (November 2022)
- "Practical Law Private Client Guide, Executive Transfers to the United States: Planning and Avoiding Pitfalls," Thomson Reuters (2017)

Credentials

Education

- New York University School of Law, LLM, Taxation
- California Western School of Law, JD, *cum laude*
- University at Buffalo, The State University of New York, BS, *cum laude*

Admissions

- California
- New Jersey
- New York
- U.S. Supreme Court
- U.S. Tax Court

Offices

- New York, NY

Areas of Focus

Practice

- Business Succession Planning
- Charitable Gift Planning
- China Practice
- Elder Law

- Estate & Trust Administration
- Estate Planning
- Income, Estate & Gift Tax Planning
- International Estate & Income Tax Planning
- Private Wealth, Estates & Trusts