ARCHER & GREINER PC
ATTORNEYS AT LAW

Daphne Goldman

Of Counsel

Private Wealth, Estates & Trusts /

Estate & Trust Litigation

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Overview

Daphne focuses her practice in the areas of estate and trust administration and estate and tax planning. She represents and advises financial institutions, high-net-worth individuals, individual and corporate fiduciaries, and nonprofit and charitable entities.

Daphne has a wealth of experience in counseling and representing financial institutions, both with regard to fiduciary risk management and with regard to the administration of individual fiduciary accounts within the context of corporate oversight.

Daphne brings to her practice decades of representing individual and corporate trustees in all aspects of trust administration from the most complex contested litigation, to providing counsel regarding all aspects of trust administration, including fulfilling fiduciary obligations, responding to distribution requests, interpreting trust documents, and the preparing and filing of fiduciary accounts.

In the area of estate administration, Daphne represents fiduciaries and beneficiaries in intestacy proceedings and probating Wills; the collection and distribution of estate assets; the preparation and filing of inventories and accountings; the satisfaction of federal and state tax obligations; the presentation of contested and non-contested matters to the courts; and the settlement of complex estates, including contested and non-contested probate litigation involving will interpretation, will contests, and fiduciary accountings.

Daphne also 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, and charitable planning matters. In addition, she provides counsel regarding estate, gift, and generation skipping transfer tax saving techniques.

Daphne joined Archer following an 18-year career in the financial services industry in which she provided legal counsel to the senior management of a very large regional bank, including the Chief Fiduciary Officer, Chief Investment Officer, and Director of Personal Trusts, with respect to the management of entity-wide legal risk pertaining to trust, estate and guardianship administration. Prior to her time as in-house counsel, Daphne spent 14 years in private practice, focusing on sophisticated estate planning, estate and trust administration, and complex fiduciary litigation.

Daphne is a frequent lecturer and author in the area of estates and trusts. She has lectured and published for the Pennsylvania Bar Association, Pennsylvania Bar Institute, New Jersey Institute of Continuing Legal Education, Philadelphia Bar Association, and The Legal Intelligencer, among others. Daphne is a former member of the Trust Advisory Committee of the Pennsylvania Bankers Association and previously served three terms on the Executive Committee of the Philadelphia Bar Association, Probate Section. She currently is a member the Litigation Committee of the Philadelphia Bar Association, Probate Section.

Professional and Community Involvement

- Pennsylvania Bankers Association, Trust Advisory Committee (2005-2022)
- Philadelphia Bar Association, Probate Section
- Member, Litigation Committee
- Chair, "Green Book" Committee
- Former Member, Nominations Committee; Executive Committee (Served three 3-Year Terms); Rules and Practice Committee
- Former Chair, Ad Hoc Committee to Address Financial Product Abuses

Select Articles

- *Virtual Representation of Trust Beneficiaries: A Comparison of the Statutes in New Jersey and Pennsylvania*, Philadelphia Bar Association, Probate Section Newsletter (February 2017)

Past Speaking Engagements and Seminars

- "10th Annual Estate Litigation Seminar," (November 2022)
- "Diversity and Inclusion in Our Practice: How Can We Improve?" The Allegheny County Bar Association, Probate and Trust Section (December 2020)
- "A Comparison of the Pennsylvania Uniform Trust Act and the New Jersey Uniform Trust Code: A Comparison of the Law of Trustee Vacancy, Removal and Resignation; A Comparison of the Two Laws from a Fiduciaries Perspective; and A Comparison of the Law Governing Virtual Representation," New Jersey Institute of Continuing Legal Education & the Philadelphia Bar Association (September 2016)

- “The New Jersey Uniform Trust Code, Virtual Representation under the NJ Uniform Trust Code,” New Jersey Institute of Continuing Legal Education (June 2016)
- “Virtual Representation, Charitable Interests and Related Issues under the Uniform Trust Code,” Archer & Greiner 4th Annual Estate Litigation Seminar (April 2016)

Credentials

Education

- Temple University, LLM, Taxation
- Temple University, JD
- Bryn Mawr College, BA, *cum laude*

Bar Admissions

- New Jersey
- Pennsylvania

Offices

- Voorhees, NJ

Areas of Focus

Practice

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

Industries

- Financial Institutions