



Gideon Rothschild

SENIOR COUNSEL



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Gideon Rothschild, former Co-Chair of the Private Client practice group and now Senior Counsel, focuses on domestic and international estate planning and asset protection. He is a nationally-recognized authority on the use of offshore trusts and estate planning strategies for wealth preservation and succession planning. His practice also includes estate administration and the representation of clients in taxpayer disputes at the federal, state and local levels.

Gideon serves high-net-worth individuals with assets ranging from \$5 million to more than \$1 billion. His clients include professionals, entrepreneurs, real estate developers and owners, closely-held business owners and directors of publicly-held companies.

Gideon distinguishes himself from many of his peers in that his estate planning recommendations are integrated with asset protection objectives. By educating his clients on the non-tax benefits available with trusts and other vehicles and how they can be drafted in a flexible manner, his clients can achieve both tax savings and wealth preservation. Such benefits include protection from divorce, creditors or litigation exposure.

Gideon is a former Chair of the ABA's Real Property Trust & Estate Law Section, a Fellow of the American College of Trust & Estate Counsel, an Academician of the International Academy of Estate & Trust Lawyers and a Director of the Society of Trust & Estate Practitioners (STEP) - US Region.

Clients describe Gideon as "*one of the top asset protection attorneys in the country*" and is regarded by peers as "*a leading authority on asset protection.*" Since 2006, Gideon has been listed in *New York Super Lawyers®*, appearing as one of the "Top 100 New York Super Lawyers" - the only Trusts and Estates lawyer who received the highest point totals in the New York Metro area. He's consecutively ranked in *Chambers USA* each year while the directory acknowledges him as "*a very accomplished attorney*" who is "*preeminent in the trusts and estates field.*" Gideon has been peer-recognized by *Best Lawyers in America* for over 10 years. In 2017 and 2018, Gideon has been selected as **New York City's Lawyer of the Year** for his outstanding contributions in Trusts & Estates. He

Practices / Industries

- Trusts & Estates
- Asset Protection
- Tax
- Family Offices
- Private Clients
- Philanthropy and Charitable Organizations
- Trusts & Estates and Family Law Litigation

further has the distinction of being an AV® Preeminent™ Rated lawyer and one of New York's Top Rated Lawyers in his field by Martindale-Hubbell.

Gideon is the co-author of BNA Tax Management Portfolio on "Asset Protection Planning" and is a member of the Advisory Boards of BNA Tax Management and Trusts & Estates magazine. He has served as an Adjunct Professor at the University of Miami School of Law and New York Law School Graduate Programs. He lectures frequently on asset protection and advanced estate planning strategies to professional groups.

Gideon is active in numerous charitable organizations including the Anti-Defamation League where he serves as National Planned Giving Chair and is a board member of the Anti-Defamation League Foundation. He also serves on the professional advisory committees of the NY Historical Society (Co-Chair) and the Metropolitan Museum of Art.

Gideon is also licensed as a Certified Public Accountant.

Prior results do not guarantee a similar outcome.

Education

- New York Law School (J.D., *with honors*)
- Bernard M. Baruch College of the City University of New York (B.B.A.)

Bar/Court Admissions

- U.S. District Court, Southern District of New York
- New York
- U.S. Tax Court

Professional Affiliations

- Peer-elected Fellow, The American College of Trust and Estate Counsel (ACTEC) and active Member of both International Estate Planning and Asset Protection Committees
- Academician, The International Academy of Estate and Trust Law
- Member, American Bar Association, Real Property Trust & Estate Law Section, Chair (2014-2015)
- Member, Society of Trusts & Estates Practitioners (New York Chapter) , Chair (2007-2010), Vice-Chair (STEP USA)
- Member, Advisory Board, *Trusts & Estates* magazine
- Member, Advisory Board, *BNA Tax Management*, Estates, Gifts and Trusts
- Member, Professional Advisory Committee of the Museum of Art & Design
- Member, Professional Advisory Committee of the Metropolitan Museum of Art
- Member, Professional Advisory Committee of the American Friends of Israel Museum

Recognition

- Best Lawyers: 2006 - 2024
- Super Lawyers: 2006 - 2024
- Who's Who Legal Thought Leaders: Private Client 2023
- Private Client Global Elite: 2019, 2022-2023
- Chambers HNW 2019
- Bloomberg BNA: Estates, Gifts and Trusts, *Tax Portfolio Author of the Year*

- "World's Leading Practitioners," *Who's Who Legal: Private Client 2019*
- Best Lawyers in America® for over 10 years, *The BestLawyer 2019 Edition*
- "Best for Asset Protection - New York," *2019 Legal Awards*
- Citywealth Leaders List 2019
- Winner, STEP Founders Award of the Society of Trusts & Estate Practitioners
- "World's Leading Trust & Estate Practitioners," *Euromoney's Expert Guides*
- "Top 40 Tax Advisors," *CPA Magazine*
- "Top 100 Attorneys" serving private clients, *Worth/Robb Report*
- "Distinguished Accredited Estate Planner" award, National Association of Estate Planners & Councils
- Best Lawyers in America®, *American Lawyer*
- Best Lawyers in New York®, *American Lawyer*
- 2008 Honoree, UJA-Federation of New York, Trusts & Estates Group of The Lawyers Division
- Who's Who in American Law
- AV® Preeminent™, Martindale-Hubbell
- AVVO rated "Superb" (with a score of 10 out of 10)
- AVVO Clients' Choice Award 2012

Webinars

- Moses Singer Webinar, The \$5 Million Window of Opportunity, 2012
- Moses Singer Webinar, 2010 Year-End Estate Planning Opportunities, 2010
- Moses Singer Webinar, Current Developments in Asset Protection Planning, 2010
- Moses Singer Webinar, New Developments in Foreign Trusts and Foreign Account Reporting, 2010

Publications

June 7, 2023

Protect Your Retirement Savings from Lawsuits

Bottom Line Inc.

May 12, 2021

Proposed Transfer Tax Legislation Calls for Sweeping Changes

January 1, 2020

Minimize Creditor Challenges to Self-Settled Spendthrift Trusts

Trusts & Estates

November 18, 2019

Estate Planning in a Low Interest Rate Environment

October 28, 2019

How Your Trust Can Avoid Taxes by Changing States

Bottom Line, Inc.

September 30, 2019

Estate Planning that Benefits from Low Interest Rates

Bottom Line, Inc.

September 2, 2019

How to Protect Your Assets Against Creditors

Bottom Line, Inc.

August 5, 2019

How to Head off Costly Battles Over Wills and Trusts

Bottom Line, Inc.

June 17, 2019

Estate Planning for Families with Stepchildren

Bottom Line, Inc.

May 13, 2019

Is Your Retirement Account Safe from Creditors?

Bottom Line, Inc.

April 15, 2019

Why You Should Review Your Estate Plan Now

Bottom Line, Inc.

March 18, 2019

The Right Way to Leave a Bequest for the Care of Your Pet

Bottom Line, Inc.

February 18, 2019

Be Cautious When Naming Beneficiaries for Your IRA

Bottom Line, Inc.

January 21, 2019

Avoid Family Feuds Over Who Inherits Your Collectibles

Bottom Line, Inc.

December 24, 2018

Here's Who You Should Appoint as Your Executor or Trustee—and Who to Definitely Not Appoint

Bottom Line, Inc.

December 3, 2018

Year-End Estate Planning Moves to Make Before December 31

Bottom Line, Inc.

October 1, 2018

Don't Forget About Your Digital Assets in Your Estate Plan

Bottom Line, Inc.

September 3, 2018

Don't Die Without a Will

Bottom Line, Inc.

August 6, 2018

Are You a Trustee of a Life Insurance Trust? Know Your Obligations!

Bottom Line, Inc.

July 9, 2018

Divorce? Change Your Estate Planning Documents!

Bottom Line Inc.

July 2, 2018

Alaska Supreme Court Invalidates Exclusive Jurisdiction Provision

Trusts & Estates Magazine

June 11, 2018

How You Can Change an Irrevocable Trust: Decanting

Bottom Line Inc.

March 19, 2018

Does Your Will Contain this Formula for Disaster?

Bottom Line Inc.

February 26, 2018

Uh Oh - Should Your Heirs Now Give Your Gifts BACK to You?

BottomLineInc

January 3, 2018

Asset Protection Planning - 20 Years Later

Representative Matters

Gideon's clients are high net worth individuals ranging in net worth between \$5 million and more than \$1 billion. Clients include real estate investors, CEOs of public companies, professionals, hedge fund managers, entrepreneurs, and closely held business owners. They have varied needs including cross border planning, asset protection planning, estate administration, and wealth transfer planning and implementation. He works closely as needed with financial advisors, accountants and business consultants to achieve his clients' objectives.

Some of the more interesting/creative assignments consisted of the following:

- Representing dozens of taxpayers with unreported foreign accounts before the IRS under the Offshore Voluntary Disclosure Initiative.
- Assisting a family office with multi-generational estate and wealth preservation planning strategies.
- Assisting a U.K. resident with the purchase of U.S. real estate using a trust structure that avoids U.S. estate tax and is income tax efficient.
- Assisting a Chinese client with pre-immigration planning including the establishment of trusts and entities to minimize the impact of U.S. income and estate taxes.
- Assisting a U.S. client with creation of a foreign trust to protect his assets from potential future litigation.
- Creating a revocable trust for an incompetent person under a guardianship

- proceeding to effectuate a more tax efficient estate plan than under his existing Will.
- Retention as an expert witness on numerous matters involving foreign asset protection trusts.
 - Developing a plan to minimize the tax consequences attributable to distributions from a foreign trust to U.S. beneficiaries.
 - Representing a trust company with respect to trust litigation

Testimonials

Client Testimonials

Gideon Rothschild has given us excellent advice. He follows up very promptly on all that he says he will take care of and replies to all our calls and emails equally quickly. We feel very reassured that we have our estate planning in the hands of a very knowledgeable, competent, considerate professional individual who is looking for our best interests.

Private client review on Leaderslist

He is like the go-to guy in asset protection. He's very good, he comes across very well, and knows his area backwards and forwards. He instills a lot of confidence in his clients; if they go to him they're usually worried about the future, and he can get through technical information and explain it to the client in a concise way.

Interviewee from Chambers HNW Guide 2018

He has a specialty in asset protection; he's really the go-to guy on that. He knows everything on that, and he's also very creative. He's very proactive - you know you never have to remind him to do something, he's on top of things, he's on time and he can deal with complicated issues for clients.

Interviewee from Chambers HNW Guide 2018

Perhaps I should say "ditto" as you are perennially recognized as a "Best Lawyer". I am sure it is well deserved as we witnessed firsthand. Congratulations again.

Client Email September 2017

I did not realize I was working with a legal luminary! I mentioned casually to my tax accountant that I had signed up with you on creating a trust and she started to tell me how well known you were in NYC in your domain of specialization. Of course I was not aware of your reputation when I decided to work with you but I did feel I was working with someone knowledgeable based on my conversation with you. I am glad we are working together on something that is important for me.

Anonymous August 2015

Just a short note to let you know that I enjoyed utilizing your services on the 2 family estate planning projects as well as benefiting from your vast knowledge and experience

with occasional dashes of humor to illustrate that not all lawyers are drab and dry. Should another occasion arise that conforms with your area of expertise, I would be pleased to contact you. The same sentiments heartily apply to Kerrie [Horrocks] as well.

Client email October 2014

Some months ago I came to see you, not sure how to get myself out of a problem. With your steady professional hand on the tiller you steered me across choppy waters to a successful conclusion. You deserve my thanks and praise along with unbounded appreciation.

Letter from client August 2014

According to sources, New York based Gideon Rothschild is "a very accomplished attorney" who is "preeminent in the trusts and estates field."

Chambers USA 2014 Edition

I am writing to let you know how great your courses are doing at Lawline. Your course on FATF and the Patriot Act Requirements had 890 views and a 92% Approval rating – Awesome! Your seminar on Asset Protection Planning... (sit down for this one) received OVER 3700 views and a 95% Approval. Wow! This is amazing stuff! I hope you will be interested in teaching with us again soon.

David Cykiert, Program Attorney for Lawline

"Gideon Rothschild of Moses & Singer LLP is 'one of the top asset protection attorneys in the country,' according to sources. He is singled out for his expertise in wealth preservation and succession planning through offshore trusts and sophisticated planning strategies."

Chambers USA 2012 Edition

"Gideon Rothschild of Moses & Singer LLP operates out of New York and, in addition to his extensive experience in domestic and international estate planning, is regarded by his peers as 'a leading authority on asset protection.' "

Chambers USA 2011 Edition

"Gideon Rothschild specializes in offshore trusts and asset protection. Clients praised his high level of expertise: "Clever and careful, he is an expert in this arcane area of wealth management."

Chambers USA 2008 Edition

"Congratulations on receiving the recognition as one of New York's Super Lawyers! The recognition that you continue to receive from your peers must be very rewarding to you. I certainly agree with the designation that you are truly a 'Super Lawyer.' I am very pleased that you have continued to work with me to help our family, even though the total estate is not large. As a former attorney, I have a special appreciation for your outstanding guidance and work on our behalf."

Excerpt from a client's email to Gideon Rothschild

"As an author of books on similar subject matters and as an attorney certified by the State Bar of California in estate planning, trust and probate law, I applaud the Asset Protection Outline that Gideon Rothschild authored. In my opinion, it is the best and most comprehensive listing of the concepts and tactics of which I am aware."

F. Bentley Mooney, Jr. JD LLM (tax)

"I prefer Mr. Rothschild's Asset Protection courses to those chaired by other faculty as they are better organized and generally have better quality faculty. I would sign up for another Asset Protection Planning update if Mr. Rothschild ran it."

Program attendee December 2008 ALI-ABA Asset Protection Trust Planning Webcast

Speaker Reviews

"Excellent coverage of a difficult topic."

"Superb Presenter."

"Well done presentation. Been a Lawline.com user for years. Never disappointed."

Rating received: 95.94%

Feedback from Tax Planning for Non-Resident Aliens with U.S. Assets or Beneficiaries

December 2017

"Showed good enthusiasm."

"I was surprised by how interesting and engaging this presentation was!"

"This was a very good presentation; the information is so pertinent and condensed

"excellent presentation."

Rating received: 95.56%

Feedback from FATF and Anti-Money-Laundering Ethics: What Should a Transactional Lawyer Worry About February 2016

"Very well done."

"Excellent"

"high-level class by attorney with 25 yrs experience in NY."

"The lecturer was excellent. Clearly an expert in the area of asset protection."

"Great course!"

"Extremely helpful!"

Rating received: 94.81%

Feedback from Asset Protection Planning: What Every Practitioner Should Know February 2016

"The top authorities in this field."

Rating received: 94.76%

Feedback from FATF and Anti-Money-Laundering Ethics: What Should a Transactional Lawyer Worry About?

February 2015

"Very fine presentation."

"Excellent course and instructor!"

Rating received: 93.88%

Feedback from Asset Protection Planning: What Every Practitioner Should Know

February 2015

"Insightful."

"A great speaker."

"Very informative."

"Retain him long-term!"

"A dynamic and engaging speaker."

"Good case studies and examples."

"A great speaker, he commanded the room. Good use of real-life examples."

"A great presentation."

"A very good speaker. I learned a lot of practical and useful applications. It was apparent that he is the subject matter expert on the Asset Protection Strategy."

"Mr. Rothschild's presentation was relevant and entertaining. His knowledge and use of examples made it a valuable presentation."

Rating received: 4.8/5.0

Feedback from NYU-SCPS 2013 Summer Institute in Taxation

Prior results do not guarantee a similar outcome.

Videos

Reasons To Avoid Probate

What is Asset Protection Planning

Check out the entire YouTube Video Series entitled "What you need to know about Trusts and Estates"

Navigating a Perfect Storm Webinar, *May 21, 2020*