

Estate Planning, Counseling, Administration & Litigation

- Comprehensive estate planning and administration services for individuals and families, from foundational wills and powers of attorney to wealth preservation strategies for high-net-worth clients, business owners, and families with complex dynamics
- Estate and legacy planning, including asset protection, business succession, charitable giving, planning for special needs children, and blended family structures; and trust and estate administration, including probate and state and federal tax matters
- Disputes related to the investment, management and distributions of estates, trusts and guardianships

Planning for the future is one of the most impactful steps an individual can take for themselves and their loved ones. Greenbaum offers comprehensive estate planning, counseling, and estate administration services tailored to meet the unique needs of individuals and families across New Jersey and New York. We strive to provide the highest level of personal attention, coupled with extensive experience and professional expertise. Our collaborative approach emphasizes practical guidance that simplifies complex legal issues to best enable and empower our clients to make informed decisions about their future.

Our estate attorneys approach each client relationship with empathy, understanding, and a commitment to clear communication, guiding clients through every stage of the process. Our work ranges from advising clients with basic needs on fundamental and routine issues to structuring and implementing sophisticated protective strategies for clients with more intricate needs, including those with complex family dynamics, high-net-worth individuals, and the owners of closely held or family businesses.

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Experience

Representative Matters

- Advised the administrator of a multi-state \$70 million estate, where the decedent died without a will, in resolving competing beneficiary interests and completing administration without dispute.

- Advised the executor of an estate with more than 30 domestic and international charitable and individual beneficiaries, coordinating cross-border distributions and guiding the matter to final settlement.
- Advised the administrator of a multi-million-dollar estate holding an interest in a closely held business, preparing New Jersey inheritance tax filings and securing state approval of a favorable valuation position.
- Successfully petitioned for and obtained a federal and state income tax refund exceeding \$500,000 on behalf of a decedent's estate.
- Represented beneficiaries in a long-pending estate administration, securing long-delayed distributions and recovering additional funds by challenging improper expense allocations.
- Designed and implemented advanced estate planning strategies for a high-net-worth client, removing more than \$40 million in assets from the taxable estate.
- Structured a comprehensive estate plan for a family with a special needs child, creating long-term protections while preserving flexibility for other beneficiaries.
- Advised a blended family on estate planning involving jointly owned real estate and retirement assets, balancing spousal support with protection of children's inheritance rights.
- Developed an estate plan for a closely held business owner with children in differing roles, equitably allocating interests while preserving business continuity.
- Structured asset ownership and financial arrangements for a married couple to preserve assets while qualifying a cognitively impaired spouse for Medicaid benefits.
- Advised a family on long-term care planning for an elderly parent, implementing strategies to protect substantial assets while ensuring access to assisted living and medical care.
- Implemented a tax-efficient succession plan for family-owned operating and real estate businesses, enabling the orderly transfer of ownership to the next generation.
- Successfully defended an executor against challenges to a complex administration involving the succession and continued operation of privately held businesses within a multi-million-dollar estate.
- Representing a multi-million-dollar estate in a contested will proceeding asserting claims of undue influence, lack of testamentary capacity, and forgery.

Insights & More

Announcements

36 Greenbaum Attorneys Selected for Inclusion in 2026 Edition of New Jersey Super Lawyers

3.20.26

Greenbaum, Rowe, Smith & Davis Recognized on 2026 "Best Law Firms" List by Best Lawyers

11.06.25

Meghan E. Anderson Joins Greenbaum, Rowe, Smith & Davis as Tax and Estate Planning, Counseling, Administration & Litigation Associate

10.09.25

2026 Edition of Best Lawyers Recognizes 54 Attorneys in 41 Practice Areas: Eight Greenbaum Lawyers Recognized on "Ones to Watch" List

8.21.25

Thirty-Five Attorneys from Greenbaum, Rowe, Smith & Davis Selected for Inclusion in 2025 Edition of New Jersey Super Lawyers

3.19.25

Greenbaum, Rowe, Smith & Davis Recognized on 2025 "Best Law Firms®" rankings by Best Lawyers®

11.06.24

Client Alerts

One Big Beautiful Bill Act: An Overview of Tax Impacts for Individuals

8.25.25

Wealth Transfer Strategies to Consider in the Age of COVID-19

6.09.20

Seminars & Events

Finnegan is DEAD! A Walk Through a Fictional Probate Case

4.24.26

Will Drafting Fundamentals 2026

2.24.26

Estate Planning for Alternative Assets: Sports Memorabilia

9.25.25

Will Drafting Fundamentals Post-Pandemic

2.16.25

New Jersey Probate Process: In 7 Simple Steps

8.08.23

Income and Estate Tax Treatment of Trusts

8.02.23

2023 Family Law Symposium

1.26.23

What to Look for in Your Client's Estate Planning Documents

5.03.22

New Jersey Estate Administration from Start to Finish

3.17.22

Estate Administration Procedures: Why Each Step Is Important

6.07.20