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# AMY HOLZMAN

## Partner

Amy Holzman heads our wills, trusts, estate planning, and estate litigation practice. She works closely with clients to gain an understanding of their personal goals, then applies her knowledge and experience in the law to tailor an estate plan that will meet their objectives. Amy prepares a wide variety of plans for U.S. and non-U.S. citizens, traditional and non-traditional families, and a range of individuals, including those with complex tax and personal issues. Since estate tax laws are subject to change, she prepares wills with maximum postmortem flexibility to minimize taxes.

Amy routinely prepares health care proxies, living wills, powers of attorney, and sets up various revocable and irrevocable trusts that benefit individuals and charities. Amy's practice encompasses planning for disabled individuals through a variety strategies, including the creation of special needs trusts, also known as supplemental needs trust. In addition, she represents clients in marital planning by preparing and negotiating prenuptial and post-nuptial agreements.

Amy's practice also includes estate administration, where she represents individual beneficiaries, charities, executors, administrators, and trustees. A thorough knowledge of the taxation of trusts and estates allows her to simplify estate administration for her clients by advising them on issues such as gift, estate, and generation-skipping transfer taxation. Her familiarity with court procedures enables her to help clients navigate the complex tax and court systems to ensure the proper distribution of estate assets.

Before joining Barton, Amy was with Debevoise & Plimpton, advising on and structuring tax plans for high net worth individuals, corporate and individual executors and trustees, and charitable entities. She regularly lectures to various groups on estate-planning topics.

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## Contact

P: 212.229.9532

P: 212.687.6262

F: 212.202.4555

aholzman@bartonesq.com

## Education

Fordham University School of Law, J.D.

New York University School of Law, post-graduate trust and estates course work in taxation.

University of Wisconsin, B.A.

## Key Capabilities

Wills, Trusts and Estates

Durable Powers of Attorney

Health Care Proxies/Living Wills

Beneficiary Representation

Guardianship

Estate and Gift Tax Planning

Estate and Trust Administration

Executor/Trustee Representation

Surrogate's Court Proceedings

## Practice Areas

Wills, Trusts and Estates Estate and Gift Taxation Charitable Giving

## Bar & Court Admissions

State of New York

## Professional Affiliations

Trusts and Estates Law Section Member of the New York State Bar Association

## Charitable/Civic Involvement

Board member of Savvy Ladies Financial Empowerment

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## Speeches, Panels & Presentations

"Lifetime Giving, Minors and Incapacitated Beneficiaries." NYSBA – Estate Planning and Will Drafting, New York City and Webcast. (February 7, 2018).

Lecture on topic of Wills, Trusts and Estates, including for the New York City Bar Association

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## Quotes, News & Publications

Member and published author, Fordham Law Review; Estate Planning Aspects of 1998 Budget Proposal