



Joseph L. Goldman

CO-CHAIR, TRUSTS & ESTATES, AND CO-CHAIR, ELDER
LAW & SPECIAL NEEDS PLANNING

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PRACTICE AREAS

Trusts & Estates

Commercial Real Estate

Corporate & Business Law

Elder Law & Special Needs Planning

EDUCATION

B.A., Queens College, 1972, *magna cum laude*

J.D., Columbia University School of Law, 1976

Joseph L. Goldman is co-chair of the Trusts & Estates practice at the firm. He concentrates his practice on sophisticated trust and estate planning and administration, business succession planning, and business transactional matters. In addition to wills and revocable trusts, Joe's estate planning practice includes drafting various irrevocable trusts such as insurance trusts, GRATs, QPRTs and charitable trusts, to meet his clients' needs. Joe advises owners of closely held businesses on business and succession planning, taxation, and real estate matters. His practice also includes formation, dissolution, purchase and sale of businesses, as well as drafting shareholder agreements, LLC operating agreements, partnership agreements and limited partnership agreements.

Joe is the author of the *New Jersey Estate Planning Wills and Trusts Library: Forms and Practice Manual*, published annually by Data Trace.

In Joe's Words:

"After practicing law for almost 20 years in New York and New Jersey, I joined Pashman Stein in 2005 to build the firm's Trusts & Estates practice. Our group focuses on trusts and estates planning and administration, wealth transfer planning and succession planning for business owners. We also provide counsel on elder law, special needs planning and guardianships. I enjoy working with our clients, including young married couples, long-time married couples, seniors, business owners, and physicians. My practice includes families of three

generations, from grandparents to parents to children. As the estate and gift tax laws continue to change, the challenges and satisfaction of helping clients achieve family objectives and effective gift and estate tax planning remain as fresh as when I started, over thirty-five years ago."

Community & Professional Associations

- Member, New York State Bar Association
- Member, New Jersey Bar Association
- Member, Bergen County Bar Association
- Member, Greater New Jersey Estate Planning Council

Bar Admissions

New York

New Jersey

Teaching/Seminars

- Adjunct Instructor, New York University Continuing School of Education – Estate Planning For Wealth Management
- Instructor, New York City College of Technology – Estate Planning for Paralegals
- Seminars on estate planning for various institutions, including Citibank, HSBC, New York Life Insurance Company, and Memorial Sloan Kettering Hospital
- Lecturer, New Jersey Institute of Continuing Legal Education (ICLE) – Sophisticated Estate Planning