



# Melissa M. Grossman

Co-Chair, Private Client, Trusts and Estates

Philadelphia

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Melissa focuses her practice on sophisticated estate and tax planning for high net worth individuals and families. Her practice includes the preparation of wills and trusts, defective grantor trusts, grantor retained annuity trusts, residence trusts, and dynasty trusts, advising clients with respect to insurance planning, generation-skipping planning, and structuring family limited partnerships and limited liability companies.

Melissa also counsels her clients on succession planning matters, including complex tax and administration issues related to wealth transfers, and the intergenerational transition of closely held family businesses through tailored and tax-efficient estate plans. As a result, Melissa often serves as an adviser to multiple generations of family members, working with each of them to ensure a seamless transition of family wealth and legacy.

Melissa regularly represents fiduciaries in the administration of complex estates and trusts. This includes assisting fiduciaries with probate, obtaining asset valuations and disclaimers, advising on income and/or post-mortem tax planning, preparing death tax returns, and advocating in front of the IRS in estate tax audits.

Additionally, she has extensive experience in the areas of charitable planning, and regularly assists clients in establishing and administering substantial private family foundations.

Melissa has been a frequent lecturer and panelist at legal conferences and events, addressing topics that range from sophisticated estate planning techniques to charitable giving. She is active in her community and has served as a board member of the Jewish Federation of Southern New Jersey and Jewish Family and Children Services of Southern New Jersey.

Melissa serves as an adjunct professor at the University of Pennsylvania Carey Law School where she teaches the course "Gift and Estate Tax in Practice."

Melissa earned a Bachelor of Science in economics from the Wharton School of the University of Pennsylvania, and earned her law degree from New York University School of Law.

## Practice Areas

- Private Client, Trusts and Estates
- Nonprofit & Tax-Exempt Organizations
- Family Office

## Education

- New York University School of Law, J.D., 2005
- University of Pennsylvania The Wharton School, B.S., 1998

## Bar Admissions

- New Jersey
- Pennsylvania

## Affiliations

Pennsylvania Bar Association

Philadelphia Estate Planning Council

New Jersey Bar Association

American Bar Association

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