

Annie L. Mehlman

Partner

Contact

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Advises in the areas of estate planning and administration, trust administration, charitable giving and sophisticated income, gift and estate tax planning.

Annie advises individuals and families on strategies to maximize wealth preservation across generations, including succession planning, insurance planning and planning with business interests, and represents executors and trustees in estate and trust administration matters.

She also works with high-net-worth individuals in family law matters, including the negotiation of prenuptial, postnuptial and separation agreements, and individuals and fiduciaries in trusts and estates disputes.

Practices

CHARITABLE GIVING AND PLANNING

ESTATE PLANNING

ESTATE AND TRUST ADMINISTRATION

GENERAL PERSONAL REPRESENTATION

INDIVIDUAL CLIENT SERVICES

REPRESENTATION OF FIDUCIARIES

MATRIMONIAL REPRESENTATION

Bar Admissions

New Jersey

New York

Education

New York University School of Law, LL.M.

New York University School of Law, J.D.

Washington University in St. Louis, B.A.

- *magna cum laude*

Publications

- "The SLAT Trap," *Trusts & Estates*, December 2021
- "Standing to Enforce Restrictions on Use of Charitable Gifts," *New York Law Journal*, Jan. 21, 2014, co-author
- "Estate and Tax Planning for Same-Sex Spouses in New York," *3 Tax Stringer* 5, May 2012, co-author
- "Do Not Postpone Lifetime Gifts," *88 Tax Strategies* 63, February 2012, co-author
- "An Estate Planner's Guide to Client Representation," *New York Law Journal*, Jan. 30, 2012, co-author

Memberships

- Trusts, Estates & Surrogate's Court Committee, New York City Bar Association

Prior Experience

- Kramer Levin Naftalis & Frankel, 2010-2014