Katten

Katten Muchin Rosenman LLP

Ronni G. Davidowitz

Partner

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Practices

FOCUS: Trusts and Estates

Fiduciary Litigation

Industries

Private Client Services

Recognition

Chambers High Net Worth, Private Wealth Law, 2017–2019

Best Lawyers in America, 2007–2017, 2019

American College of Trust and Estate Counsel, Fellow

Best Lawyers Lawyer of the Year 2015 - Ronni G. Davidowitz - Trust and Estates

Super Lawyers, New York, 2006–2018 Top Women Lawyers - Trusts and Estates, 2013

Citywealth Leaderslist, 2015–2016

International Law Office Client Choice Award, Private Client - New York, 2016

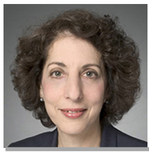
Ronni G. Davidowitz is head of Katten's New York Trusts and Estates practice. Ronni concentrates her practice in trusts and estates law with a focus in private client services. She has extensive experience in complex estate and trust administration, including estate and gift tax audits and petitions and protests for redetermination of assessed deficiencies, basic to highly sophisticated pre- and post-mortem estate planning, contested and uncontested surrogate court matters, including probate disputes, judicial and informal fiduciary accountings. She is committed to developing strategies that respond to the constant changes in the tax structure and economic climate, including counseling on asset protection, business succession planning and intergenerational transfers. She also provides advice in the nonprofit sector to public charities and private foundations in tax planning.

Her clients include high-net-worth individuals and families, closely-held businesses, entrepreneurs, artists and art collectors. Ronni focuses her tax and estate planning on finding creative and efficient ways to avoid litigation. However when litigation is necessary, Ronni has a successful track record in estate and trust litigation and probate litigation.

On June 7, 2016, Ronni was honored by the UJA-Federation of New York Lawyers Division for her contributions to the Trusts & Estates community and the community at large. Ronni also has been honored by the Great Neck Center for the Visual and Performing Arts for pro bono legal services provided to the Center, and by the South Brooklyn Legal Services for pro bono legal services provided to individuals infected with HIV and their families.

Memberships

- American College of Trust and Estate Counsel, Charitable Organization Committee, State Chair for Downstate New York
- United Jewish Appeal-Federation of Jewish Philanthropies, Former Chair, Trust and Estate Section
- The Rockefeller University, Committee on Trust and Estate Gift Plans
- NewYork-Presbyterian Hospital, Planned Giving Advisory Council
- American Heart Association, Professional Advisory Council
- Calvary Fund Inc. of Calvary Hospital, Professional Advisors Council



Lawyers Division Trusts and Estates Group Honoree, UJA-Federation of New York's Annual Dinner 2016

Chambers USA, 2017

IFC Top 200 Powerwomen, IFC Top 200 Powerwomen, 2017

Education

JD, St. John's University School of Law

BA, Queens College | The City University of New York

Bar Admissions

New York

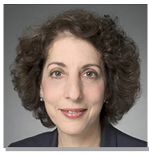
Court Admissions

US Tax Court

- Association of the Bar of the City of New York
- New York State Bar Association, Trusts and Estates Section, Charitable Organizations and Estate Administration Committees
- New York Tolerance Center, Advisory Group Co-Chair

Advisories

- 2018 Year-End Estate Planning Advisory (November 19, 2018)
- The Tax Cuts and Jobs Act: Gift, Estate and Generation-Skipping Transfer Tax Reform (February 28, 2018)
- 2017 Year-End Estate Planning Advisory (November 20, 2017)
- 2016 Year-End Estate Planning Advisory (November 21, 2016)
- 2015 Year-End Estate Planning Advisory (November 23, 2015)
- The Surface Transportation and Veterans Health Care Choice Improvement Act of 2015: Important Changes Affecting Tax Filings for Individuals and for Trusts and Estates (August 20, 2015)
- Eight Key Estate Planning Opportunities Arising from the Supreme Court's Decision on Same-Sex Marriage (June 29, 2015)
- 2014 Year-End Estate Planning Advisory (November 26, 2014)
- Trusts and Estates Planning Opportunities Arising From Recent Changes to the New York Estate Tax and Trust Income Tax Regimes (April 9, 2014)
- The New York Non-Profit Revitalization Act of 2013 – Important Changes Affecting New York Nonprofit Entities and Charitable Trusts (February 24, 2014)
- 2013 Year-End Estate Planning Advisory (November 2013)
- Estate Planning Opportunities Arising from Recent Revenue Ruling Concerning Marriages of Same-Sex Couples (September 3, 2013)
- Estate Planning Opportunities Arising from Recent Landmark Supreme Court Decisions Concerning Marriages of Same-Sex Couples (June 28, 2013)
- Estate Planning After the Fiscal Cliff Deal (January 16, 2013)
- 2012 Year-End Estate Planning Advisory (November 20, 2012)
- IRS Releases Guidance on Foreign Financial Asset Reporting (February 1, 2012)
- Offshore Voluntary Disclosure Program Reopens (January 11, 2012)
- 2011 Year-End Estate Planning Advisory (November 23, 2011)
- Extension and New Guidance for the Voluntary Disclosure Initiative for Undisclosed Foreign Assets (June 10, 2011)
- House Votes 277-148 to Approve Senate Tax Cut Extension Bill (December 17, 2010)
- 2010 Year-End Estate Planning Advisory (November 2010)



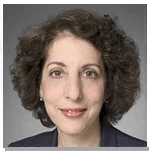
- Important Changes to New York Not-For-Profit Corporation Law (October 14, 2010)
- 2010 Estate Tax Planning Strategies—Once-in-a-Lifetime Opportunities vs. Potential Traps for the Unwary (September 21, 2010)
- 2010 Revisions to New York Power of Attorney Statute Take Effect September 12 (August 24, 2010)
- HIRE Act Affects Foreign Trusts and Imposes Additional Requirements on US Persons with Foreign Accounts (March 24, 2010)
- New FBAR Guidance and Proposed Regulations Issued (March 4, 2010)
- US Government Acts Quickly to Help Haiti with Tax Benefits for Donors (February 2, 2010)
- Hooray, There's No Estate Tax: Now What Do I Do? (January 7, 2010)
- Possible One-Year Elimination of Estate and Generation-Skipping Transfer Tax in 2010: Going, Going, Gone? (December 23, 2009)
- 2009 Year-End Estate Planning Advisory (December 2009)
- IRS Announces One-Time Extension for Voluntary Disclosure (September 21, 2009)
- Power of Attorney Law Changes in New York on September 1, 2009 (August 27, 2009)
- IRS Extends FBAR Filing Date (August 12, 2009)
- Changes to New York Powers of Attorney Effective September 1 (July 28, 2009)
- IRS Temporarily Relaxes FBAR Filing Requirements for Non-US Persons (June 10, 2009)
- "FBAR" Filings Disclosing Foreign Accounts Due June 30 (May 12, 2009)
- 2008 Year-End Estate Planning Advisory (December 2008)
- New Expatriation Legislation Passed Unanimously by Congress and Signed by President (June 2008)
- Opportunities: Cloud Over Economy Creates Estate Planning Silver Lining (February 2008)

Articles

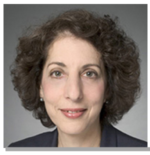
- Katten Team Publishes 2018 Year-End Estate Planning Series (December 4–7, 2018)
- Co-author, *United States v. Byrum*: Too Good To Be True?, *ACTEC Law Journal* (February 2017)

Speaking Engagements & Presentations

- Participant | ACTEC 2019 Mid-Atlantic Regional Meeting | New York, New York (September 13–15, 2019)



- Panelist | The Latest Evolution in Tax-Efficient Investing for Sophisticated Investors, Family Offices, Wealth Advisors, Distributors and Alternative Asset Managers | New York (October 29, 2018)
- Presenter | Mitigating Fiduciary Risk and Litigation | New York Bankers' Association | 2018 Annual Trust & Investment Conference | Cooperstown, New York (September 26–28, 2018)
- Speaker | Mitigating Fiduciary Risk | New York, New York (July 2018)
- Presenter | Mitigating Fiduciary Risk | New York, New York (June 2017)
- Panelist | Updates on Tax-Efficient New Products and Private Placement Products | New York, New York (January 10, 2017)
- Presenter | Mitigating Fiduciary Risk | New York, New York (September 29, 2016)
- Presenter | Taking a Fresh Look at Your Estate and Investment Plans in the New Year | New York, New York (January 12, 2015)
- Presenter | Post-Election Perspective: Planning for the Sunset of Tax Cuts | New York, New York (November 8, 2012)
- Presenter | Planning During Turbulent Times | New York, New York (April 26, 2012)
- Speaker | IRS vs. The Taxpayer Perspective | 42nd Annual Estate Planning Institute | New York, New York (September 12–13, 2011)
- Speaker | FLPs and LLCs – Watching the Law Develop | 41st Annual Estate Planning Institute | New York, New York (September 13–14, 2010)
- Speaker | Understanding Gift Taxes | New York, New York (March 15, 2010)
- Speaker | Philanthropy and the Family Office | 2nd Annual Family Office Conference | New York, New York (March 3, 2010)
- Panelist | Estate Tax Legislation - 2010 Is Here: What Now? | Webinar (February 22, 2010)
- Speaker | Charities and Options for Battered Endowments | 7th Annual Sophisticated Trusts & Estates Law Institute | New York, New York (November 19–20, 2009)
- Panelist | Upcoming Estate Tax Legislation: What You Need To Know in 2009 (November 3, 2009)
- Panelist | Unlocking Your Value—Trusts and Estates: Securing Your Future in the Current Economic Environment | New York, New York (October 29, 2009)
- Speaker | IRS vs. The Tax Payer Perspective | 40th Annual Estate Planning Institute | New York, New York (September 14–15, 2009)
- Speaker | Estate Planning to Prevent Future Litigation | 2009 Annual Estate Planning Conference | New York, New York (July 14, 2009)
- Speaker | Estate Planning for the Middle Class Client | New York, New York (June 9, 2009)



- Speaker | Recent Developments in Estate Planning and Taxation | New York, New York (May 14, 2009)
- Speaker | Estate Planning in a Down Economy | Ninth Annual Westchester Chapter Tax, Estate, and Financial Planning Conference | Armonk, New York (May 1, 2009)
- Speaker | Understanding Estate, Personal, Gift & Fiduciary Income Tax Returns 2008 | New York, New York (December 11–12, 2008)
- Speaker | IRS vs. the Taxpayer Perspective | Estate Planning Institute 2008 | New York, New York (September 8–9, 2008)
- Presenter | De-Coupling the Federal and State Estate Taxes | 38th Annual Estate Planning Institute | New York, New York (September 10–11, 2007)
- Speaker | Trust Your Planning: A Comprehensive Review of Trust Planning and Drafting Techniques Seminar | New York, New York (May 30, 2007)
- Chair | Navigating Charitable Waters: What Every Practitioner Needs to Know | The New York State Bar Association's 2007 Annual Meeting | New York, New York (January 22–27, 2007)