



## Jonathan A. Schwartz counsel

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Jonathan A. Schwartz is counsel in the firm's Taxation and Trusts & Estates practice groups. He focuses his practice on advising high-net-worth clients and their families on sophisticated estate planning matters with a particular emphasis on tax-efficient transfers of wealth to future generations and charitable organizations.

Jonathan is well-versed in complex estate planning instruments and presents clients with options and solutions throughout all stages of legacy planning.

After graduating from law school, Jonathan clerked for the Honorable Vito L. Bianco in the New Jersey Tax Court. He is licensed in New Jersey and New York and is admitted to the U.S. Tax Court. Jonathan currently serves on the Board of Trustees of the Jewish Community Foundation of Greater Metrowest New Jersey.

### Bar Admissions

- New Jersey
- New York
- U.S. Tax Court

### Education

- New York University School of Law, LL.M. in Taxation, 2019
- Fordham University School of Law, J.D., *cum laude*, 2012
- State University of New York at Binghamton, B.S., 2008

## Community Involvement

- Jewish Community Foundation of Greater Metrowest, Board of Trustees

## Practice Areas

- Taxation
- Wills, Trusts & Estates