

Jonathan Schwartz Spoke at NJICLE 2023 Estate Planning Summer Institute on the "Ethical Pitfalls of Saying 'I do' to Joint Representation of Married Clients"

Jonathan Schwartz, counsel in the Taxation and Trust & Estates practice groups, was a speaker at the NJICLE 2-day 2023 Estate Planning Summer Institute where he presented "Ethical Pitfalls of Saying 'I do' to Joint Representation of Married Clients" on July 12. Jonathan discussed the ethical issues that may arise when representing married couples in estate planning, with a focus on the interplay between the duty of confidentiality and the duty of disclosure.

Jonathan provides strategic counsel to high-net-worth clients and their families on sophisticated estate planning matters with an emphasis on tax-efficient transfers of wealth to future generations. He is well-versed in complex estate planning instruments and presents clients with options and solutions throughout all stages of legacy planning. Prior to joining Einhorn Barbarito, Jonathan was an associate at Proskauer Rose LLP in New York.