

Heather Levine-Levy

Counsel

New York
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Education

- Brooklyn Law School, JD
- University of Pennsylvania, *Magna Cum Laude*, College of Arts and Sciences, BA

Practices & Industries

- Trusts & Estates
- Corporate

Admitted to Practice

- New York
- New Jersey

Court Admissions

- US District Court for the District of New Jersey

Biography

Heather concentrates her practice on a wide variety of trusts and estates matters. She has extensive experience in estate planning, including structuring estate plans to best meet family, business, and other objectives, with the goal of minimizing estate, gift, generation skipping, and income taxes to protect and preserve assets and avoid disputes, costs, and delays. She is proficient in drafting a broad range of wills, revocable and irrevocable trusts, advance directives, and prenuptial and postnuptial agreements. Heather also has deep experience in estate administration, preparing probate petitions, estate tax returns, court inventories, and receipts and releases with accountings prior to distribution of assets.

In addition to her trusts and estates work, Heather also has experience in corporate law, including drafting operating agreements, stockholder agreements, redemption agreements, and stock purchase agreements, and in real estate law, including preparing and negotiating contracts of sale, clearing title issues, and preparing closing statements.

Bar Associations

- New York State Bar Association, Trusts and Estates Law Section, Member

Selected Memberships & Affiliations

- Barclay Damon's Women's Forum

Representative Experience

- Drafted wills with disclaimer trusts and trusts for the benefit of children and grandchildren.

- Drafted revocable trusts and pour-over wills and irrevocable trusts to hold investments, real property, and life insurance.
- Represented executors and administrators of complex estates with significant assets.
- Prepared federal and New York State estate tax returns for estates holding real property, brokerage accounts, IRA accounts, life insurance policies, annuities, and interests in entities holding real estate.
- Represented executors in the sales of homes, co-op apartments, and condo apartments.

Prior Experience

- Lewis and Garbuz, PC, Associate
- Wilson Elser Moskowitz Edelman & Dicker LLP, Associate
- Jankoff & Gabe, PC, Associate
- New York State Supreme Court, Kings County, Honorable Jack M. Battaglia, Brooklyn Law School Post-Graduate Fellow
- Kings County District Attorney's Office, Domestic Violence Bureau, Legal Internship
- New York State Supreme Court, New York County, Honorable Sherry Klein Heitler, Judicial Intern

Selected Honors

- Selected to *Super Lawyers* New York Metro: Estate Planning and Probate, 2021

Selected Alerts & Blog Posts

- An Estate Plan to Protect Yourselves and Assets Outside Your Wills
- An Estate Plan to Protect Your Assets: Wills and Credit Shelter Trusts
- An Estate Plan to Protect Your Children