



Joshua S. Rubenstein

Partner

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Practices

FOCUS: Trusts and Estates
Tax Controversy and Litigation
Fiduciary Litigation

Industries

Private Client Services
International

Recognition

Chambers USA, 2006–2015

Chambers Global, 2012–2014
International Private Client – Global-wide, 2015

Best Lawyers in America, 1993–2016

Super Lawyers, 2006–2015

Citywealth, International Lawyer of the Year, 2012

Editor's Choice Award, 2011

Leader's List, 2011
Top 20 Men in Private Wealth Management, 2011
Top 20 Leading Lawyers, 2006–2010
Lawdragon, 500 finalist – 2010

Joshua S. Rubenstein is national head of the firm's Trusts and Estates practice and national chair of the Private Client Services group. He also is a member of the firm's Board of Directors and the Diversity Committee.

Josh advises businesses and private individuals, including high net worth individuals, senior executives, professionals, entrepreneurs, artists and others with unique intellectual property interests. He handles a wide variety of private matters for these clients on a local, national and international level, including personal and estate planning, the administration of estates and trusts, and contested Surrogate's Court and tax proceedings. He has counseled clients in trust and estates matters for more than 30 years, building relationships with those who value and rely upon his advice. He is a popular choice among clients for "complicated multijurisdictional trust and tax work" and is regarded as a "pragmatic technician" who "will cut to the chase" (*Chambers USA*).

Josh's clients say he is "a real polymath – not just a great lawyer, but a great chap to deal with and a safe pair of hands," adding that he is "very able technically and very user-friendly" while also being "very good at getting down to the essence of what needs to be resolved and getting it done" (*Chambers USA*). Globally, he is "very highly rated for his cross-border work and is very active on the international trust scene as the treasurer of the International Academy of Estate & Trust Law" (*Chambers Global*). He focuses on creating sophisticated, yet uncomplicated, solutions for clients. Josh finds unforeseen problems and uses an interdisciplinary approach to resolve those problems, bringing in members of teams that deal with taxes, real estate or corporate and other transactional areas of the law, as necessary.

Josh is a former adjunct professor at Brooklyn Law School and is a frequent lecturer and author. He is regularly quoted in the media, with credits in *The New York Times*, *The Wall Street Journal*, *New York Law Journal*, *Citywealth*, *Forbes*, *Kiplinger's*, *Crain's*, *The Washington Post*, *FOX News*, *Bloomberg News* and *CNBC*. The Katten Trusts and Estates practice has earned recognition from Society of Trust and Estate Practitioners (STEP) for Best North American Private Client Team (2011, 2012) and from *Citywealth* for International Law Firm – USA (2012, 2013) under Josh's leadership. Clients note that within the Trusts and Estates practice, Josh is "spectacular" and "clearly the star of the Trusts and Estates team" (*U.S. News – Best Lawyers® "Best Law Firms"*).



American College of
Trust and Estate
Counsel, Fellow
*The International Who's
Who of Private Client
Lawyers*, Top Ten
Most Highly Regarded
Individual, 2013
New York Bar
Foundation, Fellow
*Crain's New York
Business*, Most-
Connected New
Yorkers, 2014
AV Preeminent Peer
Review Rating by
LexisNexis
Martindale-Hubbell
Citywealth Leaderslist
2015

Education

JD, Columbia Law
School, Harlan Fiske
Stone Scholar
BA, Columbia
University, *magna
cum laude*, Phi Beta
Kappa

Bar Admissions

New Jersey
New York

Court Admissions

US District Court,
District of New Jersey
US District Court,
Eastern District of
New York
US District Court,
Southern District of
New York
US Tax Court

Memberships

- American Bar Association, Real Property, Trust and Estate Law and Taxation Sections, International Estate Planning Committee Past Chair
- American Law Institute, Estate Planning Advisory Board
- Central Park Conservancy, Advisory Council
- Chess in Schools
- City of Hope
- American College of Trust and Estate Counsel, International Estate Planning Committee Chair, International Membership Committee Chair, State Laws Committee Past Regent and Past Chair
- American College of Trust and Estate Counsel Foundation, Director
- Columbia Law School, Trusts, Wills and Estate Planning Advisory Council
- Columbia University, Planned Giving Advisory Committee
- Columbia University Health Sciences Center, Advisory Council
- Fiduciary Accounting and Trust Administration Guide, Attorney Advisory Board
- Fiduciary Trust International, Trust Advisory Board
- Hadassah Estate Planning Seminar, Faculty and Advisory Board
- International Bar Association, Family Law Section Officer
- International Wealth Advisors Forum, Steering Committee
- Irvington Institute for Immunological Research, Past President
- Jewish Board of Family and Children's Services, Past Vice President
- Legal Week, Conference Advisory Board
- Lincoln Center for the Performing Arts, Professional Advisors Council
- Matthew Bender, Editorial Board
- Merrill Lynch, Attorney Advisory Board
- Metropolitan Museum of Art, Professional Advisors Council
- Museum of Art and Design, Professional Advisory Committee
- Museum of Modern Art, Professional Advisors Council
- New Jersey Bar Association
- New York City Ballet, Professional Advisory Committee
- Association of the Bar of the City of New York
- New York Office of Court Administration Advisory, Committee on Surrogate's Courts
- New York Philharmonic, Advisory Council
- New York Public Library, Professional Advisory Committee
- New York State Bar Association, Trusts and Estates Law Section Past Chair
- No Name Discussion Group
- Practising Law Institute, Estate Advisory Committee
- Society of Trust and Estate Practitioners (STEP)
- The International Academy of Estate and Trust Law (IAETL), Academician; Treasurer, Executive Council
- UJA Federation, Trust & Estates Division Past Chair
- Warren's Heaton, Editorial Board