

**Bruce D. Steiner**

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| **Practice Areas:** Estate Planning and Administration, Tax, and Business Succession Planning | |
| **Bar Admission:** 1976, New York, U.S. Tax Court and U.S. Claims Court  1978, New Jersey, Florida and U.S. District Court, District of New Jersey  1996, U.S. Court of Appeals, Third Circuit  2005, U.S. District Court for the Southern and Eastern Districts of New York  **Education:** New York University (LL.M. in Taxation, 1976)  Gerald L. Wallace scholar State University of New York at Buffalo (J.D., *cum laude*, 1975)  Cornell University (A.B., 1972) | Bruce Steiner has over 40 years of experience in the areas of taxation, estate planning, business succession planning and estate and trust administration. He is a frequent lecturer at continuing education programs for bar associations, CPAs and other professional groups. He is a commentator for Leimberg Information Services, Inc., is a member of the editorial advisory board of *Trusts & Estates*, is a technical advisor for *Ed Slott’s IRA Advisor*, and has written numerous articles for *Estate Planning*, BNA Tax Management’s *Estates, Gifts & Trusts Journal*, *Trusts & Estates*, the *Journal of Taxation*, *Probate & Property*, *TAXES*, the *CPA Journal*, the *CLU Journal* and other professional journals. Bruce has been quoted in various publications including *CNBC*, *Fox Business*, *Forbes*, *The New York Times*, *Wall Street Journal*, *Daily Tax Report*, *Lawyers Weekly*, *Bloomberg’s Wealth Manager*, *Financial Planning*, *Kiplinger’s Retirement Report*, *USA Today*, *Newsday*, the *New York Post*, the *Naples Daily News,* *Individual Investor*, TheStreet.com, Bloomberg, CBS News, Observador and Dow Jones (formerly CBS) Market Watch. Bruce has served on the professional advisory boards of several major charitable organizations and was named a New York Super Lawyer every year since 2010 and was selected to Best Lawyers of New York for 2018 and 2019. |

***LECTURER***

American Bar Association

The American College  
Bank of America  
Baruch College School of Continuing Education  
Bergen Tax Study Group  
Bloomberg BNA Tax Management  
Central New Jersey Estate Planning Council  
C.W. Post Tax Institute  
Committee of Banking Institutions on Taxation  
Consumers Union  
Cornell University  
Essex County Bar Association  
Fairleigh Dickinson Tax Institute  
Financial Planning Association

The Florida Bar  
Greater New Jersey Estate Planning Council  
Hudson Valley Bank  
Hudson Valley Estate Planning Council  
JP Morgan Chase Bank  
Lawline

Leimberg Webinars  
Lighthouse  
Merrill Lynch  
Metropolitan Life Insurance Company  
Middlesex County Bar Association  
Middlesex-Somerset Estate Planning Council  
National Association of Personal Financial Advisors  
New Jersey Institute for Continuing Legal Education  
New Jersey State Society of Certified Public Accountants  
New York City Bar Association  
New York City Estate Planning Council  
New York State Bar Association  
New York State Society of Certified Public Accountants

New York Tax Study Group  
New York University School of Continuing Education  
Northern New Jersey Estate Planning Council  
Rockland County Estate Planning Council  
Seattle Estate Planning Council  
Society of Financial Service Professionals  
Strafford  
University of Washington School of Law  
Wachovia Bank  
Westchester Estate Planning Council  
Western Connecticut Estate Planning Council

***PUBLICATIONS***

[**Decanting Trusts to Remove Unwanted Beneficiaries**](https://www.kkwc.com/wp-content/uploads/2019/08/Steiner.pdf)  
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[**Celebrity Estate Planning: Misfires of the Rich and Famous II - Co-authored by Jessica Galligan Goldsmith, David Y. Choi, Shaina S. Kamen, Gerry Joyce, Christiana M. Lazo, Alison Silverman**](https://www.kkwc.com/wp-content/uploads/2019/05/KKWC-399414-v1-Celebrity_estate_planning_II_-_Probate__Property_May_June_2019.pdf)  
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***MEMBER***

New York City Bar Association  
New York State Bar Association  
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American Bar Association  
The Florida Bar  
Estate Planning Council  
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