



TEL: 201-525-6270

FAX: 201-678-6270

mberman@coleschotz.com

EDUCATION

- New York University School of Law, LL.M., Taxation, 1984
- Rutgers University School of Law - Newark, J.D., 1980
- Columbia University, B.A., 1977

BAR & COURT ADMISSIONS

- New Jersey, 1980
- U.S. District Court, District of New Jersey, 1980
- Pennsylvania, 1983

Marc R. Berman

Member

Tax, Trusts & Estates

Marc Berman is a tax attorney whose practice includes all areas of federal and state taxation. He has had extensive experience in estate planning and administration, the implementation of qualified retirement plans, partnership taxation and corporate taxation. Before joining Cole Schotz in 1981, Mr. Berman worked in the tax section of Coopers & Lybrand.

Mr. Berman lectures frequently in the areas of estate and pension planning for the New Jersey Bar Association and civic groups. He has also been the featured annual speaker for Northwestern Mutual Life Insurance Company's special seminar for life insurance agents.

NOTEWORTHY

Mr. Berman has been awarded an AV rating for his professionalism and the quality of his legal work from Martindale-Hubbell, the premier directory of legal professionals. He has been selected for inclusion in the 2011 and 2012 editions of the *Best Lawyers in America®* for Trusts and Estates, the *New Jersey 2011 Five Star Wealth Managers* list, published by *New Jersey Monthly* magazine, and *New Jersey Super Lawyers®* for Estate Planning & Probate.

He has also been included in *201 Magazine's* list of Top Lawyers in Bergen County for 2011.

PUBLICATIONS

Disclaimers: A Critical Post-Mortem Tax Planning Tool, *New Jersey Law Journal*, November 10, 2008

Funding a Trust With Retirement Assets, *Cole Schotz Docket*, Winter 2008

Funding a Trust with Retirement Assets, *New Jersey Law Journal*, December 10, 2007

Two Approaches to Charitable Giving, *New Jersey Law Journal*, July 2, 2007

Marc R. Berman (Continued)

LAW BLOG ARTICLES

Giftling to a Spousal Lifetime Access Trust, *Tax, Trusts & Estates Law Monitor*

SPEAKING ENGAGEMENTS

- New Opportunities: The Impact of the 2010 Tax Legislation on Estate and Gift Planning

PROFESSIONAL ACTIVITIES

- New Jersey State Bar Association
- Pennsylvania Bar Association