Kostelanetz LLP

Ian Weinstock
Partner

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Biography

During the course of his almost 30-year legal career, Ian Weinstock has built a practice that spans the range of trusts, estates and personal tax planning issues, including sophisticated estate planning techniques for ultra-high net worth individuals; choice-of-entity issues and succession planning for small businesses; philanthropic planning; the administration of decedents' estates; and advising fiduciaries and beneficiaries on all aspects of trust administration. With extensive in-house experience at major U.S. financial institutions, he advises corporate fiduciaries on all aspects of their businesses, including trust acceptance policies and procedures, corporate governance, regulatory compliance, trust administration and tax reporting, as well as advising private banking/wealth management institutions on a wide range of fiduciary and trust-related matters.

With a strong background in cross-border matters, Ian advises multi-jurisdictional individuals and families on the full panoply of issues that may confront them, including pre-immigration planning, establishing structures for foreign investment in the U.S., setting up trusts for non-U.S. relatives of U.S. people or for U.S. relatives of non-U.S. people, expatriation planning, and a myriad of international tax compliance matters.

Ian received his B.A. in History summa cum laude from Yale College in 1991 and his J.D. from Yale Law School in 1994. Prior to joining Kostelanetz LLP, Ian worked at Fried, Frank, Harris, Shriver & Jacobson, Debevoise & Plimpton and Day Pitney, as well as in the Legal Departments of both Morgan Stanley and UBS. Ian is a member of the New York State Bar Association's Trusts & Estates Section and the Society of Trust and Estate Practitioners.

Education

- Yale College, B.A. in History (1991), *summa cum laude*
- Yale Law School, J.D. (1994)

Bar Admissions

- New York State, 1995

Professional Organizations

- New York State Bar Association, Trusts & Estates Section
- Society of Trust and Estate Practitioners

Publications

- IRS Doesn't Have It Easy With Malta Pension Enforcement Efforts (August 28, 2023)
- Understanding FBAR Disclosure Responsibilities: When Must An Entity Or Connected Individual File? (March 1, 2019)
- U.S. Tax Residency: Some Black-and-white Rules, Some Gray (March 1, 2018)
- The Many Faces Of Form 3520 (August 30, 2017)

Awards and Recognition

- Best Lawyers — Trusts & Estates in New York