



Danielle Friedman

Principal, Practice Group Leader - Estates and Trusts (East)

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Philadelphia, PA – 267.338.1334

Danielle Friedman is a Practice Group Leader - Estates and Trusts (East) and principal in the firm's Estates & Trusts Practice Group. Danielle provides comprehensive and sophisticated estate and tax planning services for an array of clients. She regularly assists clients with wealth preservation, asset protection planning, charitable giving and more common estate planning needs.

Danielle also guides fiduciaries through estate and trust administrations, including probate matters, preparing inheritance and estate tax returns and handling creditors' claims and beneficiary distributions.

Additionally, Danielle works within the firm's Business Law and Transactions Practice Group, where she regularly handles corporate governance matters, business succession planning and the preparation of various commercial agreements.

The foundation of Danielle's practice is built on developing, maintaining and fostering client relationships by providing attentive, responsive and individually tailored solutions to each client.

Danielle received her J.D. from Temple University and has been recognized by Super Lawyers Pennsylvania as a "Rising Star" since 2017.

Representative Matters

- Prepared a variety of trust agreements and other estate plan documents for a client whose net worth exceeded \$500 million in order to address complex family dynamics and maximize the passage of generational wealth; addressed the client's concerns regarding the management of his business after death to ensure a smooth transition and avoid liquidation.
- Prepared an estate administration handbook for a client to be used by their family after death; the estate included 50+ business entities, and the plan outlined in detail how each entity would be owned after death.
- Utilized specialized trusts to sell business interests to save a client millions of dollars in state income tax.

Services

- Business Law and Transactions
- Estates and Trusts
- Tax Law

- Completed merger and severance of several trusts to save client's family millions of dollars in generation-skipping transfer tax.
- Transferred a client's assets to trusts to reduce potential federal estate tax liability.
- Conducted a comprehensive review of the client's existing planning to determine opportunities for new planning strategies.

Education

- Temple University (J.D.)
- George Washington University (B.A., *magna cum laude*)

State Bar Admissions

- Pennsylvania
- New Jersey
- South Dakota

Professional Affiliations

- PLAN of PA, Board Member
- Pennsylvania Bar Association, Real Property, Probate and Trust Law Section
- Philadelphia Estate Planning Council
- Mid-Atlantic Fellows Institute of The American College of Trust and Estate Counsel, Graduate

Recognitions

- Selected to Pennsylvania Rising Stars by Super Lawyers® for Estate Planning and Probate (2017-2026)
- Main Line Today Top Lawyers 2013: Trusts, Wills and Estates

Languages

- Conversational Russian