

## Herbert E. Nass

Partner/Co-Chair

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### Areas of Focus

Private Client Services

"When a major life event happens, such as a death, birth or divorce, myriad legal, financial and personal issues arise. My job is to anticipate problems and equip my clients with solid estate plans that preserve their wealth for future generations."

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### Overview

**Herb Nass is one of the country's most sought-after trusts and estates lawyers. During his more than 35-year career, he has earned a reputation among high net-worth and celebrity families for smart planning and counseling aimed to preserve their wealth and minimize tax obligations during transitional life events.**

Clients come to Herb for airtight wills drafted and executed to withstand future scrutiny or objection in court. His ability to anticipate potential disputes with solid no-contest clauses saves surviving family members time and money. If requested by a client, Herb may also serve as the executor, trustee or administrator of a will or trust.

Herb's in-depth experience handling intricate trust and estates matters is invaluable to helping clients overcome difficult legal challenges involving intestate spouses or parents. In estate litigation, he has developed a significant track record defeating competing estate administration petitions to keep control of the estate with surviving children. He also helps musicians and authors draft sophisticated provisions to protect their artistic property.

Families value Herb's deep commitment to understanding their assets and relationship dynamics. Many of his clients' children and grandchildren continue to rely on his advice and planning to navigate current estate tax laws and lifetime gifting options to avoid or minimize estate and gift tax obligations.

Among judges, court personnel and his legal colleagues, Herb is highly respected for his ethical, sensitive and efficient approach to complex trust and estates matters. Several judges have appointed him as Guardian ad Litem in complex matters.

Before joining Davis+Gilbert, Herb managed his own law firm in New York, New York, where he represented numerous high-profile and celebrity clients and their families. During that time he also authored three books on wills and estate planning. Early in his career, he practiced law at Paul, Weiss, Rifkind, Wharton & Garrison and at Tenzer Greenblatt Fallon & Kaplan.

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## Representative Experience

- Successfully handled the complicated estate administration for the estate of an internationally renowned musician.
  - Drafted sophisticated estate planning documents including literary property trusts for multiple prominent and bestselling authors.
  - Created and implemented a rolling Grantor Retained Annuity Trust (GRAT) strategy resulting in future appreciation and wealth transfers for high net worth individuals including Wall Street executives and business owners.
  - Handled a large estate in which The Metropolitan Museum of Art was the sole residuary beneficiary and obtained a “No Objection” from the New York Attorney General’s Office.
  - Created Spousal Lifetime Access Trusts (SLAT) for high net worth individuals and families to minimize or completely avoid future estate and/or gift taxes.
  - Established two Delaware Dynasty Trusts, in conjunction with clients’ financial advisors, Delaware counsel and a Delaware Trust Company, to hold appreciating assets (tangible and non-tangible) and allow additional appreciation to accrue gift and estate tax free.
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## Insights + Events

### Alert

2024 Lifetime Gift and Estate Tax Exemption Update  
November 16, 2023

### Press Mention

Inside Edition | ‘Friends’ Co-Creator Pays Tribute to Matthew Perry  
November 1, 2023

### Alert

Estate Planning Issues to Consider Before Selling Your Business  
May 4, 2023

### Press Mention

InsuranceNewsNet | Presley Beneficiary Battle Sets Example of Poor Estate Planning Practices  
February 17, 2023

### Press Mention

Inside Edition | Priscilla Presley Contesting Will of Daughter Lisa Marie  
January 30, 2023

### Press Mention

Inside Edition | A Look Back at Lisa Marie Presley's Life  
January 27, 2023

### Press Mention

Forbes | Where There's a Will, There Can Be a War  
October 26, 2022

### Press Mention

Law360 | Davis+Gilbert Adds Trusts And Estates Boutique Team"  
January 10, 2022

### Press Mention

Attorney At Law Magazine | Davis+Gilbert Expands with Prominent Trusts and Estates Lawyer Herb Nass  
January 10, 2022

### Publication

The 101 Biggest Estate Planning Mistakes  
October 26, 2009

### Publication

Wills of the Rich & Famous  
April 1, 1991

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## Credentials

### Education

New York University School of Law (J.D., 1984)  
• Editor-in-Chief, *Journal of International Law and Politics*  
Swarthmore College (B.A., 1981)

### Bar Admissions

New York  
California  
Connecticut

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## Associations

Member, New York City Bar Association