Daniel S. Rubin

Partner

New York City

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(212) 687-2175

Daniel Rubin is a trusts and estates lawyer whose practice focuses on domestic and international estate planning, asset protection planning, and estate administration for private clients, including but not limited to family business owners and corporate executives. In addition, Daniel represents many founders and entrepreneurs, often from the technology sector, who seek out Daniel for his practical income tax planning advice, especially in connection with the qualified small business stock (QSBS) exclusion under Section 1202 of the Internal Revenue Code. Daniel's practice also involves inbound planning for international clients, designing a strategic approach to manage the potentially significant tax impact of United States law on such clients and their families.

Daniel is described as an innovative, solution-oriented trusts and estates lawyer and tax advisor who applies deep knowledge and years of experience towards achieving his clients' goals.

Daniel is a distinguished presenter on tax and estate planning topics. He is invited regularly to speak before reputable professional organizations such as the Heckerling Institute on Estate Planning, the American College of Trust & Estate Counsel (ACTEC), and state bar associations around the nation. As a thought leader, Daniel writes articles on estate and asset protection planning matters for well-read publications *such as Estate Planning, Trusts & Estates* and *Bloomberg's BNA Tax Management Portfolios*. As a way to impart his experience to future practitioners, Daniel is an adjunct professor at the University of Miami School of Law.

PRACTICE AREAS

Trusts & Estates

Tax

Private Client

EDUCATION

Brooklyn Law School, J.D.

The George Washington University, B.A.

New York University School of Law, LL.M. in Taxation

AFFILIATIONS AND APPOINTMENTS

The American College of Trust and Estate Counsel (ACTEC), Fellow

Asset Protection Committee of ACTEC, Former Chair

Estate Planning Council of New York City, Inc., Past President

International Estate Planning Committee, Trusts & Estates Law Section of the New York State Bar Association, Past Chair

ADMISSIONS

New York

UPCOMING EVENTS

DECEMBER 5, 2025

13th Annual Great Lakes Asset Protection Institute

JANUARY 23, 2026

2026 AICPA Personal Financial Planning Symposium

Experience

- Provides strategic tax advice to founders and successful entrepreneurs to manage tax impact of high income associated with successful business ventures.
- Advises entrepreneurs in applying the Qualified Small Business Stock (QSBS) exclusion to provide savings on federal and state capital gains tax.
- Advises private clients in connection with generation skipping tax strategies associated with wealth transfer to future generations.
- Advises the owners of successful closely held businesses to maximize impactful tax strategies in the sale of their businesses and transfer of assets.
- Creates sophisticated estate plans for private clients so that they may create legacies for future generations.

Community Work

- Oceanside Fire Department, Oceanside, New York, Volunteer Paramedic

Recognition

- Chambers and Partners, Private Wealth Law: Mid-Market, 2024
- Best Lawyers, New York Metro, Litigation—Trusts and Estates and Trusts and Estates Law, 2010-present
- Best Lawyers, Lawyer of the Year, Litigation—Trusts and Estates, 2021
- Super Lawyers, New York Metro, Estate Planning & Probate, 2007-present
- Martindale Hubbell AV Preeminent Peer Review Rating
- Bloomberg BNA, Tax Portfolio Author of the Year
- Worth Magazine, Top 100 Attorneys, Private Clients