Kevin Matz

PARTNER AND FAMILY OFFICE INDUSTRY GROUP CO-LEADER

As a trusted adviser to clients with significant wealth, Kevin Matz, Partner at ArentFox Schiff focuses on domestic and international estate and tax planning, estate administration, and related litigation.

Industries

Family Office Services
— Distressed Family Debt
Media & Entertainment
Private Companies
Sports

Practices

Private Clients, Trusts & Estates
— Business Succession Planning
— Charitable Planning
— Estate Planning
— Probate, Estate Settlement & Trust Administration
— Qualified Opportunity Funds & Opportunity Zones
— Trust & Estate Disputes
— Wealth Transfer Strategies

Education

New York University School of Law, LLM, 1996
Fordham University School of Law, JD, 1993
City University of New York, BS, 1986

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Kevin counsels clients on wealth transfer planning; drafting wills and trusts; gift, estate, income, and generation-skipping transfer tax planning and tax return preparation; charitable gift planning; probate proceedings and estate administration; and associated litigation as well as corporate counseling.

Kevin often serves as outside general counsel to his high net worth clients and their family offices, and melds a unique combination of technical and practical excellence with outstanding skills as both a communicator and empathic listener.

Kevin has advised clients on entity and succession planning, including use of family limited partnerships, use of grantor retained annuity trusts, transfers to irrevocable trusts involving complex valuations, qualified personal residence trusts, irrevocable life insurance trusts, and the use of charitable remainder trusts, charitable lead trusts, and private foundations to further family planning and philanthropic objectives.

Kevin is a Fellow of the American College of Trust and Estate Counsel (ACTEC), for which he currently chairs its Business Planning Committee, and also a certified public accountant. Kevin is also currently the chair of the New York City Bar Association's Estate and Gift Taxation Committee, and a former co-chair of the Taxation Committee of the New York State Bar Association's Trusts and Estates Law Section. A frequent speaker and author, Kevin presents at national industry conferences on the use of leveraged transfer techniques and estate planning for groups ranging from private equity fund managers and real estate investors to professional athletes and creative artists. Highly regarded by peers and clients, Kevin is ranked among industry leaders in the 2020 - 2023 Chambers High Net Worth guides, and was the Honoree at the UJA-Federation of New York Trusts and Estates Annual Event in June 2023 in recognition of his professional and philanthropic achievements and leadership.

In addition, Kevin is a recognized national leader in the area of qualified opportunity zone (QOZ) funds, and in July 2019 testified on ACTEC's behalf before the U.S. Department of Treasury concerning the proposed regulations on qualified opportunity funds. Kevin has also presented on QOZ funds, and their estate planning considerations, at several national conferences including the renowned Heckerling Institute on Estate Planning and the Notre Dame Tax and Estate Planning Institute.