



DANIELLE FRIEDMAN

Principal, Philadelphia



PRACTICE AREAS

- Business Law and Transactions
- Estates and Trusts

PROFESSIONAL AFFILIATIONS

- Pennsylvania Bar Association, Real Property, Probate and Trust Law Section
- Philadelphia Estate Planning Council

PRACTICE FOCUS

Danielle Friedman is an attorney in the firm's Estates & Trusts 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 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
- 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

PUBLICATIONS

- Co-Author, "The Benefits of Revocable Trusts in Estate Planning," The Pennsylvania CPA Journal, Spring 2023 Edition

SPEAKING ENGAGEMENTS

- Speaker, Estate Planning 101, Fitler Club, July 21, 2021

RECOGNITIONS

- Rising Stars, Super Lawyers Pennsylvania, 2017-Present
- Main Line Today Top Lawyers 2013: Trusts, Wills and Estates

LANGUAGES

- Conversational Russian

EDUCATION

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

ADMISSIONS

- Pennsylvania
- New Jersey