

## Ivan Sacks

PARTNER | NEW YORK

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SECRETARY ROSA MARRERO



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### Ivan is a partner in the private client and tax team.

He is a private client lawyer and trusted advisor to international and domestic families and family offices. Ivan heads the Withers Families and Family Office group, is a member of the firm's Latin American and Asia-Pacific groups and was also global chairperson of Withersworldwide from July 2013 to July 2019.

Both in the US and in an international context, he counsels families and entrepreneurs on the structuring of their closely held business interests, family offices and charitable foundations, the design and administration of trusts and estates, and comprehensive risk management, governance and succession planning. He also frequently advises banks and trust companies on fiduciary matters.

Ivan is admitted to the bar of the State of New York and the Federal District Court for the Southern District of New York. He graduated from Columbia Law School, where he was a Harlan Fiske Stone Scholar, a Charles Evans Hughes Fellow and Editor-in-Chief of the Columbia Human Rights Law Review. He is an active member of several bar associations and speaks frequently on topics related to wealth planning.

He is the global head of Withers *Pro Bono* programs and serves as a director or other fiduciary for a number of private enterprises, trusts and charitable organizations. Among publicly acknowledged roles, he is Chairman of the Jose Limon Dance Foundation, Chairman of the International Patrons of the Duomo, and Trustee of the Brugnaro Blind Trust for the Mayor of Venice, Luigi Brugnaro.

Ivan is listed in America's Best Lawyers, New York Super Lawyers, *Legal Week's* Private Client Global Elite, *Chambers and Partners*, and Citywealth Leaders Lists, among others.

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# Talks

- 'Expatriating from the US: Tax and Estate Planning Considerations,' Private Client Forum Americas 2024 - February 28, 2024, speaker
- 'Stewarding Masterpieces,' Withers & Christie's FO event - September 14, 2023, speaker
- 'Beneficial Ownership and Transparency Developments,' STEP BERMUDA Annual Conference - November 2, 2022, panelist
- 'US Developments in Beneficial Ownership Registry, Sanctions and the Potential for Passage of the Enablers Act,' STEP Brazil Branch Meeting - October 26, 2022, speaker
- 'Key Considerations in Setting Up a Family Office,' ABA (RPTE) Presentation - June 29, 2021, speaker
- 'Who Should Own and Operate a Family Office and Ideal Structures,' Tamarind Learning Podcast Series - November 10, 2020, speaker
- 'Family Office Set-up, Structure, and Compliance,' Tamarind Learning Podcast Series - November 9, 2020, speaker
- 'Withers talks: families and family office | Ep 7 - Family offices as direct investors,' Withersworldwide podcast - October 8, 2020, host
- 'Withers talks: families and family office | Ep 6 - Sibling rivalries in family businesses,' Withersworldwide podcast - October 1, 2020, host
- 'Withers talks: families and family office | Ep 5 - Asset protection for children including trusts and prenups,' Withersworldwide podcast - September 24, 2020, host
- 'Withers talks: families and family office | Ep 4 - Moving trusts,' Withersworldwide podcast - September 17, 2020, host
- 'Withers talks: families and family office | Ep 3 - Opportunities for planning in a low interest environment,' Withersworldwide podcast - September 10, 2020, host
- 'Withers talks: families and family office | Ep 2 - Employment agreements, and incentives for performance and retention,' Withersworldwide podcast - September 3, 2020, host
- 'Withers talks: families and family office | Ep 1 - Structuring family offices for tax and investment benefits,' Withersworldwide podcast - August 27, 2020, host
- 'Looking Ahead: Identifying opportunities with intra-family loans,' Withersworldwide webinar - June 22, 2020, speaker
- 'COVID-19 Update: Economic outlook and the impact of changing travel restrictions and immigration policies,' Webinar with Goldman Sachs and Withersworldwide - May 21, 2020, moderator
- 'Attitudes to wealth - Family offices and better uses of wealth,' Withers London event - September 17, 2019, speaker
- 'Global Leaders Forum On Future Directions,' Global STEP Conference, Vancouver - September 2018, panelist
- 'Tax reform and the family office,' Withers New York event - June 2018, moderator
- 'Scaling global - The law of the land,' HSBC and Slate Studios podcast - November 2017, speaker
- 'The Future of Income and Inheritance Taxation for Wealth Structures in Latin America,' 22nd International Trust and Tax Planning Summit, Miami FL - November 2013, panelist
- '360 View of Banking For Latin Clientele,' STEP Latin America Annual Conference, Montevideo, Uruguay - October 2013, panelist
- 'The Use of International Legal Structures For Family Governance,' Itau Unibanco Wealth Across Generations Conference, Sao Paulo, Brazil - September 2013, speaker
- 'FATCA Overview and Update on the Latest Issues,' STEP Brazil inaugural meeting, Sao Paolo - March 2013, keynote speaker
- 'It's Not Your Grandpa's Trust Anymore,' NMS Family Office Forum, Palm Beach - March 2013, speaker
- 'Around the World in 70 Minutes,' STEP Boston and STEP New York - February 2013, speaker

## External publications

'*The Complete Family Office Handbook: A Guide for Affluent Families and the Advisors Who Serve Them* 2nd Edition,' Wiley - November 2020, chapter co-author

'*Global Law Firm Withers' Family Office Group Advises Ultra-Rich*,' Bloomberg Law - June 25, 2019, quoted

'*Growing Withers Names Switzerland Partner Next Chair*,' The American Lawyer, May, 2019

'*Family Offices: Business, Not Personal*,' Wealthmanagement.com - June 11, 2018, quoted

'*A Tax World Turned Upside Down For The Rich*,' Financial Advisor Magazine - June 8, 2018, quoted

'*How the New Federal and New York Estate Tax Exemption Could Affect Your Estate Plan*,' Withers article - January 2018, co-author

'*Tax Cuts for Small-Business Owners? It's Complicated*,' The New York Times - November 17, 2017, quoted

'*Cuba: Fine to stormy*,' Offshore Investment - July/August 2017, co-author

'*When Heirs Fight Over Assets With Sentimental Value*,' The New York Times - April 4, 2015, quoted

## Admissions

State of New York, 1993

Southern District of New York, 1994

Registered Foreign Lawyer in the UK, 2003

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## Education

Columbia College, B.A.

Columbia Law School, Harlan Fiske Stone Scholar, J.D.

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## Languages

English

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## Memberships

Association of the Bar of the City of New York

Society of Trust and Estate Practitioners

New York State Bar Association

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## Key dates

Year joined: 2003

Year became partner: 2003

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