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Jay is a partner in the private client and tax team.

He focuses on tax, estate and financial planning with an emphasis on international tax and trust planning. Jay provides counsel to clients on inbound and outbound investment and tax planning and corporate and partnership tax planning.

He advises non-US clients with respect to US tax consequences of moving to the US; US tax and reporting consequences and planning for US beneficiaries within a structure; investing in the US, including in US real estate and private equity and hedge fund investments and advises non-US institutions as to US tax compliance.

Jay has also been heavily involved in advising clients on the IRS Voluntary Disclosure and Streamline programmes, FATCA and CRS.

Talks

- *'US - Planning for American - Swiss Succession: tax and legal aspects'* - STEP Geneva Lunch Seminar - June 2017
- *'Trump Tax Proposal Withers Breakfast Briefing'* - June 2017
- *'US tax and immigration Withers Breakfast Briefing'* - November 2016
- *'Investigating in US Real Estate Withers Breakfast Briefing'* - May 2016
- *'Investigating in the US - Tips and Traps Withers Breakfast Briefing'* - March 2016 __

- *'FATCA Update: Understanding the Impact of the New Proposed Regulations'*, briefings Zurich and Geneva - March 6/7, 2012
- *'FATCA is Coming - What Does it Mean for Trusts?'* - STEP Zurich Lunch Seminar - December 2011
- *'Planning strategies for clients from Russia/CIS Focus', International Corporate Tax Structures, Geneva and Zurich - September 27/28, 2011*
- *'The Old and New', Recent tax and regulatory changes conferences, Zurich and Geneva - February 8/9, 2011*
- *'Implication of the New US Withholding Tax Rules [FATCA] - The Trustee View'*, US Withholding Tax 2010, sponsored by IIR Conferences, London - September 29, 2010
- *'US HIRE Act 2010'*, Hiring Incentives to Restore Employment conferences, Geneva and Zurich - June 8/9, 2010
- *'How to Structure Life Insurance Contracts for US Clients', Life Insurance and Tax Planning, sponsored by Academy and Finance, Geneva - June 1, 2010*
- *'Should I stay or should I go?', conference in Geneva and Zurich - March 17/18, 2010*
- *'Can I Keep Control and Still Protect My Assets', Annual Family Office and Wealth Management Conference, sponsored by DC Finance, Tel-Aviv - February 22, 2010*

External publications

'Working Group Seeks Answers on 'Medical Condition Exception,' Tax Notes - May 15, 2020, co-author

'Coronavirus Working Group Focuses on International Tax Issues,' Tax Notes - May 14, 2020, co-author

'IRS makes treaty request for Swiss banking details of HSBC client', taxanalysts, __ May 2016, author

'Swiss banks send U.S. client data before cascade of accords', Bloomberg, August 2014, author

'Fleece the Fleeing', Trusts and Estates Magazine - July 2008, co-author

'Trusts for International Families', New York Law Journal - 13 February 2007, co-author

'Clarifying Trusts, Creditors' Rights and the Related Tax Implications,' Trusts & Estates Magazine - April 2003, co-author

'Deductibility of Private Securities Partnership Expenses after Mayer,' Tax Notes - March 1995

Admissions

Commonwealth of MA, 1989

State of New York, 1990

State of Connecticut, 1997

Registered Foreign Lawyer in the UK, 2002

Education

Northeastern University School of Law, J.D.

Syracuse University, Accounting, B.S.

University of Hartford, Taxation, M.S.

Languages

English

Memberships

- Society of Trust and Estate Practitioners
- New York State Bar Association
- Massachusetts Bar Association
- Connecticut Bar Association

Key dates

Year joined: 1995
Year became partner: 2002

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