Carolyn M. Glynn

COUNSEL
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Carolyn M. Glynn is Counsel to the firm's Estates & Trusts Practice Group and specializes in advising high net worth clients and business owners in the preservation and transfer of wealth. Based in the New York office, Carolyn develops and implements lifetime and post-mortem estate planning strategies that reduce estate, gift, GST, and income taxes while efficiently carrying out the client's goals. Carolyn's clients include corporate executives, entrepreneurs, principals at private equity firms and hedge funds, as well as the younger generation of some of New York's most prominent families.

Carolyn has vast experience creating multigenerational wealth plans using a variety of trusts, including GRATs, ILITs, QPRTs, lifetime and testamentary CLTs and CRTs, dynasty trusts, intentionally defective grantor trusts, SLATs, DPTs, and QDOTs, among others.

Carolyn also represents corporate and individual trustees and executors with respect to the probate and administration of complex estates and trusts, IRS estate tax proceedings, Surrogate's Court matters, trust modifications, and fiduciary accountings.

Carolyn regards every client as unique and believes that a genuine bond based on trust between client and counsel is essential to the success of any legal technique. In that regard, Carolyn provides each client with a customized and personalized wealth plan to achieve the client's financial legacy efficiently and elegantly and continuously nurtures each client relationship with compassion, professionalism, integrity, and accessibility.

Academics

J.D., Brooklyn Law School
B.A. in British Literature, Vassar College

Admissions

New York
Connecticut

Experience

Meltzer, Lippe, Goldstein & Breitstone, LLP
TD Wealth
Reid Glynn, LLP
Dunnington, Bartholow & Miller LLP

Professional Memberships

American Bar Association (Member, Real Property, Probate, and Trust Law Sections)
American Bar Foundation (Fellow)
New York State Bar Association (Member, Legislation and Surrogate's Court Practice Committees)
Estate Planning Council of New York City, Inc. (Member)
Palm Beach County Estate Planning Council (Member)

Publications

"Funded Buy-Sell Presentations: Agreements Bring Powerful Benefits" (March 2021)
"What Estate Planners Should Consider After the SECURE Act of 2019" (January 2020)
"Two Bright Sides of Estate Planning During COVID-19" (June 2020)
"Relief for Retirement Account Owners During COVID-19" (July 2020)
"Year-end Tax Strategies to Consider Now" (November 2020)
"Basic Considerations for the Closely-Held Business Owner," *Baruch College* (2009, 2010 and 2011)
"The Use of Disclaimers in Estate Planning," *Practicing Law Institute* (2012 and 2013)