

WILENTZ

—ATTORNEYS AT LAW—

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Jo Ann Gambale

Chair, Trusts & Estates Team

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Practice

Trusts & Estates

Education

LL.M., University of San Diego
School of Law, 1997, Taxation
J.D., Georgetown University Law
Center, 1994, Notes Editor,
American Criminal Law Review
B.A., New York University, 1989

Admissions

New Jersey, 2014
New York, 1999
California, 1999
United States Tax Court, 1999

Memberships

New Jersey State Bar Association
Middlesex County Bar Association
American Bar Association, Taxation
Section
State Bar of California, Taxation
Section, Executive Committee
(2011-2014); Past Chair, Corporate
and Pass-Through Entities
Committee (2010-2011)
San Diego County Bar Association,
Estate Planning, Trusts & Probate
Section, Past Co-Chair (2008-
2009)

Jo Ann Gambale is chair of the Trusts & Estates Team at Wilentz, Goldman & Spitzer, P.A. She concentrates her practice in the planning and administration of estates and trusts, tax planning, fiduciary accounting and in tax controversy and litigation.

Jo Ann advises clients in the development and administration of estate plans, including the preparation of wills, living wills, powers of attorney, and various types of trusts such as Life Insurance Trusts, Grantor Retained Annuity Trusts, Spousal Lifetime Access Trusts, and Sales Transactions to Intentionally Defective Grantor Trusts, and related documents used in simple and complex estate planning. She has represented individuals and families of moderate to very substantial wealth, as well as businesses, private foundations, and public charities in all aspects of wealth preservation and succession planning.

On the tax side of her practice, Jo Ann advises clients in their tax planning and tax minimization. She also prepares estate and gift tax returns, fiduciary income tax returns, and private foundation income tax returns. She earned her LL.M. in Taxation at the University of San Diego School of Law in 1997.

Jo Ann appears before the Internal Revenue Service, the New Jersey Division of Taxation, the California Franchise Tax Board, and the United States Tax Court in federal and state taxation matters. She has successfully represented clients in the IRS and New Jersey Offshore Voluntary Disclosure Programs.

On the corporate side, Jo Ann manages corporate transactions, such as formation, operation and dissolution of business entities, mergers and acquisitions, asset purchases, buy-sell agreements, employment agreements and deferred compensation plans.

Jo Ann was selected for inclusion in the "Ones to Watch" 2021 list of *Best Lawyers in America* in the area of Trusts and Estates.

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