FARRELLFRITZ ATTORNEYS

Azriel J. Baer

Partner

Uniondale

abaer@farrellfritz.com

(516) 227-0792

Azriel Baer is a trusts and estates attorney counseling high-net-worth individuals and families. Clients turn to Azi for increasingly complex estate planning matters, as well as trust and estate administration. He often works with multiple generations of families, as well as family business owners, to create custom estate plans that make sense for the family while still preserving and protecting family wealth.

Azi helps clients achieve their goals through the preparation of wills, revocable and irrevocable trust instruments and advance directives. He also utilizes more complex estate planning techniques, including transfers to spousal lifetime access trusts (SLATs), grantor retained annuity trusts (GRATs), and qualified personal residence trusts (QPRTs). He assists clients with modifying, terminating and decanting trusts and helps facilitate the smooth transfer of assets to beneficiaries.

In addition, Azi also helps clients navigate estate administration. He is able to simplify the complex so that clients can work through the sometimes challenging process of preparing estate tax returns, distributing assets, and settling estates.

Known as a collaborator, Azi serves as a valuable consultant to colleagues in the firm's estate litigation group, offering expertise in tax and estate planning that helps resolve intricate fiduciary litigation matters.

Experience

- Works closely with high-net-worth families to define roles and responsibilities related to family business ownership, operations, and succession plans.

PRACTICE AREAS

Trusts & Estates

Tax

EDUCATION

Fordham University School of Law, J.D.

New York University School of Law, LL.M. in Taxation

Rutgers University, B.A.

AFFILIATIONS AND APPOINTMENTS

New York Bar Association, Tax Section

New Jersey Bar Association, Tax Section

Nassau County Bar Association

Suffolk County Bar Association

ADMISSIONS

New York

New Jersey

- Advises clients with significant real estate holdings on how to structure their assets to maximize gift and estate tax savings.
- Helps families in all stages of trust and estate administration.
- Drafts complex wills, revocable and irrevocable trusts.
- Crafts tailored solutions for preserving and transferring specialized collections and passion investments such as art, cars, memorabilia, autographs, jewelry, and other valuable (and sometimes hard to value) collections.
- Guides clients through the process of decanting trusts to allow for trust modification.
- Counsels clients through the process of creating life insurance trusts to leverage wealth and provide liquidity in the event of an estate tax.

Community Work

- Heckscher Museum of Art, Acquisitions Committee, Member

Recognition

- Super Lawyers, Rising Stars, Estate Planning & Probate, 2015-present