

Richmund Sta. Lucia

Associate

Uniondale

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(516) 227-0612



Richmund is a trusts and estates lawyer advising high-net-worth individuals and families. Rich counsels clients throughout the estate planning process and also handles trust and estate administration. He advises clients to apply sophisticated tax planning techniques for productive wealth preservation using wills, revocable and irrevocable trusts, powers of attorney, advance directives, and similar instruments.

Rich also practiced as a licensed attorney and certified public accountant in the Philippines. His varied experience across both the United States and the Philippines informs his perspectives on international matters. Before joining the firm as an associate, he worked in New York-based law firms handling a range of corporate transactional and litigation matters.

Experience

- Structures estate plans and formulates planning strategies to minimize transfer taxes, probate expenses, and related costs while ensuring the decedent's wishes are followed.
- Drafts wills, living trusts, powers of attorney, health care proxies, and similar documents as estate planning tools for preserving and managing wealth for individuals and families across generations.
- Sets up life insurance trusts to efficiently distribute policy benefits to beneficiaries consistent with the decedent's wishes.
- Sets up grantor retained annuity trusts (GRAT) to leverage on tax advantages derived from making substantial financial gifts to family members.

PRACTICE AREAS

Trusts & Estates

EDUCATION

University of the Philippines College of Law,
J.D.

Columbia Law School, LL.M.

The Hague Academy of International Law

University of the Philippines Diliman

AFFILIATIONS AND APPOINTMENTS

American Bar Association – Real Property,
Trusts & Estates Law Section

New York State Bar Association – Trusts &
Estates Law Section

Nassau County Bar Association – Surrogate's
Court Estates & Trusts Committee

National Asian Pacific American Bar
Association

Asian American Bar Association of New York

Integrated Bar of the Philippines

Philippine Institute of Certified Public
Accountants

ADMISSIONS

Bar Admissions

New York

Philippines

Court Admissions

United States Tax Court

- Advises clients with substantial real estate on using qualified personal residence trusts (QPRT) to efficiently transfer property ownership and preserve family interests.
 - Advises clients to use intentionally defective grantor trusts (IDGT) to maximize using gift or estate tax exemptions in transferring wealth to family members.
 - Applies generation-skipping transfer (GST) tax techniques to assist with gifts made through trusts to younger generations of family members.
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Community Work

- Bantay Katarungan (Sentinels of Justice), volunteer
 - Share-the-Road Movement (Bayanihan sa Daan), volunteer
 - Rotary Club of Makati-McKinley, Board of Directors, Treasurer
 - International House, Former Resident Member, 2017-2018
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Recognition

- Columbia Law School, Mark Appel Fellowship
- Columbia Law School, Harlan Fiske Stone Scholar