ArentFox Schiff LLP
Attorneys

Christopher J. Roman

PARTNER

Chris is a trusted adviser in wealth planning and preservation for wealthy individuals and families. His clients include private business owners, families with established wealth, family offices, and principals of private equity and hedge funds.

Industries

Family Office Services
Private Companies

Practices

Private Clients, Trusts & Estates

Education

University of Notre Dame, BA, cum laude, 2004
Brooklyn Law School, JD, 2009
Villanova University School of Law, LL.M., 2013

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Chris understands the personal nature of estate planning and strives to design plans tailored to each families' particular needs. To accomplish his clients' goals, Chris implements a wide variety of estate planning tools both during life and at death. These tools, including irrevocable trusts and family entities, aim to leverage clients' estate, gift and generation-skipping transfer tax exemptions, to transfer wealth in a tax efficient manner that is also protected from creditors.

Chris also specializes in forming and administering family offices. He designs family offices that manage the flows of wealth within a family, implement succession planning, and create income and estate tax efficiencies. His commitment to providing comprehensive and understandable solutions in this area has made him a trusted advisor. Additionally, as an active writer and speaker on family office trends and topics, Chris is equipped to provide valuable and current client insights.

Client Work

- Serves as lead attorney to devise and implement estate, gift, and GST tax plans for ultra-high and high-net-worth clients.
- Serves as lead attorney to form and/or restructure family offices, including the implementation of profits interest structures, the creation of investment funds, the establishment of incentive equity programs for key employees, and compliance with securities laws.
- Serves as the main point of contact for multiple large family offices in all estate planning and trust-related matters, completing projects involving trust mergers and modifications, analysis of potential estate tax exposure, and structuring of intra-family loans.
- Counsels clients on restructuring of operating businesses for income and estate tax efficiencies, including redomiciling and trust ownership.
- Drafted complex directed trust to receive non-US person's $250,000,000 gift to daughter who is becoming a US resident and designed funding of the trust.
- Led estate administration and estate tax return preparation for patriarch of a wealthy family that included the filing of amended or late gift tax returns for 11 tax years.
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Advised private trust companies in connection with entity structure, family governance, and succession.

- Counseled international businesses on tax residency, tax planning, and intra-entity capital flows.

Publications, Presentations & Recognitions

Publications

- "Transfer Taxes: 5 Questions to Ask Clients with International Ties," *Journal of Accountancy* (Jun. 2015)
- "Dead or Alive? Rescuing your divorced client's life insurance policy from an ILIT," *Trusts & Estates*, (Mar. 2014)
- "Protecting Your Clients' Assets from their Future Ex-Sons and Daughters-In-Law: The Impact of Evolving Trust Laws on Alimony Awards," *ACTEC Law Journal*, Vol. 39, Num. 1 and 2 (Spring/Fall 2013)
- "Update on Family Office Structures in light of the Lender Case," NYSSCPA/FAE Trust and Estate Conference, Webinar (Dec. 8, 2021)

Recognitions

- Illinois Rising Star, *Illinois Super Lawyers*, Thomson Reuters (2022)
- New Jersey Rising Star, *New Jersey Super Lawyers*, Thomson Reuters (2013)

No aspect of this advertisement has been approved by the Supreme Court of New Jersey. Methodology for recognitions can be found here.

Boards, Memberships & Certifications

- Chicago Estate Planning Council, Member
- Chicago Bar Association, Family Office Committee, Advisory Council

Bar Admissions

Illinois
New Jersey
New York