



Brian D. Berman

Partner

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Brian Berman is an attorney in Greenberg Glusker's Private Client Services Group.

Brian counsels high net worth individuals and families on a wide range of estate planning issues, including complex tax planning, wealth transfer, business succession, non-profit organizations and post-death trust administration. Brian focuses on clients in the real estate, technology and entertainment sectors.

Professional Affiliations

- Volunteer Attorney, Bet Tzedek Holocaust Survivors Justice Network ZRBG Pension Project
- Member AIPAC Legal Division
- Contributor Law Law Land Entertainment Blog

Awards

- Southern California Super Lawyers Rising Stars, 2018

Bar Admissions

- California

Education

- University of California, Los Angeles School of Law (J.D., 2009)
- Washington University in St. Louis (*with honors*, 2005)
 - Spanish Language & Literature
 - Political Science

Representative Matters

- Counseled Tech Startup Founder on Advance Tax Planning Through Use of Founder Stock Transfers to GRAT.
- Counseled high net worth families in the creation of comprehensive core estate plans and advanced planning techniques that minimized transfer taxes and ensured that family values were preserved.
- Represented two extended families in the creation of a unified business succession plan for the management of an inter- generational real estate holdings company.
- Counseled a technology giant on transfer tax advantageous strategies for litigation of a technology patent portfolio.
- Represented a young technology entrepreneur in establishing a business through structures that minimize liability and maximize personal privacy.
- Advised clients regarding transfer restrictions on equity in corporations and limited partnerships.
- Represented a parent in the installment sale of a significant stake in a \$100 million dollar equipment parts supplier to irrevocable grantor trusts for son with significant tax savings.
- Counseled families in the creation of multitier limited partnerships to transfer closely held businesses for the children's benefit while preserving control by the parents.
- Represented family in creation of comprehensive estate plan based on Halahkic Jewish law principles.
- Advised a young beneficiary of \$300+ Million trust on his duties and responsibilities as beneficiary, trustee and officer/director of trust-owned businesses.
- Represented clients in the creation of a series of QPRTs to transfer both a primary residence and a vacation home to children at very little gift tax cost.
- Successfully argued for reversal of property tax reassessment by county assessor's office following a client's transfer of multiple interests in businesses holding real property.
- Represented a widow and children in the complex administration of multiple trusts following husband/father's death.
- Worked with family law counsel to implement the estate planning components of Alist celebrity's divorce settlement.
- Represented partners in real estate Holdings Company in restructuring business to provide added liability protection.

Media

March 29, 2019

Bill Proposed In California Legislature Would Tax Transfer Of Wealth Over \$3.5 Million

Greenberg Glusker Client Alert

January 8, 2019

Greenberg Glusker Promotes Four to Partnership

June 7, 2018

14 Greenberg Glusker Attorneys Named Super Lawyers Rising Stars

December 20, 2017

Doubling Down: Gift, Estate and GST Tax Changes Under the Tax Cut and Jobs Act

Greenberg Glusker Client Alert

September 2, 2016

Transfers of Family-Controlled Business Entities to Family Members Could Get More Expensive

Greenberg Glusker Client Alert

August 12, 2014

Sterling Family Trust Completes \$2 Billion Sale of Los Angeles Clippers to Steve Ballmer

Greenberg Glusker Press Release

August 14, 2013

Burning Question: What Will Happen to Cory Monteith's Estate?

Yahoo News

April 20, 2013

What's Your Exit Strategy? Five Estate Planning Considerations For Every Corporate Executive To Consider

Smart Business Los Angeles

April 16, 2013

Greenberg Glusker Takes on a Bank so Transitioning Youth Can Start Her Life

Alliance for Children Rights

December 17, 2012

Three French Hens, Two Turtle Doves, and Money for My Tax Lien

Law Law Land

October 1, 2011

Bet Tzedek Names Greenberg Glusker 2011 Pro Bono Firm of the Year

Greenberg Glusker Press Release- Bet Tzedek

February 28, 2011

And the Oscar Goes to...the Highest Bidder!

Law Law Land

February 25, 2011

Hailee Steinfeld Owns Hollywood...But Who Owns Hailee Steinfeld?

Law Law Land Entertainment Blog

December 1, 2010

Divorce Used To Be So Softcore

Law Law Land Entertainment Blog