

2019 Estate Planning Hall of Fame



Beth Shapiro Kaufman is a Member in Caplin & Drysdale's Washington, D.C., office, where she heads the firm's Private Client practice. Ms. Kaufman assists wealthy individuals with their estate planning, with a focus on minimizing taxes. She also advises lawyers and other professionals on complex issues regarding estate, gift, and generation-skipping transfer taxes. She is frequently retained by counsel to seek a private letter ruling from the IRS National Office, assist in estate and gift tax audits, or advocate a taxpayer's position before the Internal Revenue Service. She is an active member of the bar in the District of Columbia, Maryland, and Virginia.

Prior to rejoining Caplin & Drysdale in 2001, Ms. Kaufman worked for over six years in the Treasury Department's Office of Tax Policy, where she had principal responsibility for all tax policy matters affecting trusts and estates, including estate, gift, and generation-skipping transfer taxes, as well as income taxation of trusts and estates. Legislative projects included the Taxpayer Relief Act of 1997 and the Economic Growth and Tax Relief Reconciliation Act of 2001. Regulatory projects included regulations on qualified domestic trusts, generation-skipping transfer tax, charitable remainder trusts, charitable lead trusts, adequate disclosure for gift tax purposes, separate share, definition of foreign and domestic trusts, and valuation tables.

Ms. Kaufman is a Fellow of the American College of Trust and Estate Counsel, where she currently serves as the chair of the Tax Policy Study Committee and a member of the Washington Affairs Committee and the Estate and Gift Tax Committee. She is a frequent speaker on technical tax issues, current developments, and topics such as reflecting values in estate planning. Ms. Kaufman is a member of the adjunct faculty at the University of Miami School of Law, Heckerling Graduate Program in Estate Planning. During an intensive week-long course each winter, Ms. Kaufman teaches law students the ins and outs of the Generation-Skipping Transfer Tax.

Ms. Kaufman is a graduate of Harvard Law School, where she was a member and Notes Editor of the *Harvard Law Review*, and Pomona College, where she majored in economics. She and her lawyer husband are the parents of three adult non-lawyers.