



## Jay M. Eisenberg

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Jay Eisenberg provides his clients with much more than sound trust and estate planning services. His 25+ years of advising clients have given him a great understanding of family dynamics, enabling him to offer a personalized, unique assessment based upon each family's specific needs. Jay is able to anticipate potential issues and friction points among heirs and identify solutions before problems arise. Applying his vast experience to ever-changing tax and retirement laws, he collaboratively crafts plans which provide his clients with peace of mind.

With his legal focus exclusively on planning for the future, Jay excels in the area of sophisticated trust and estate planning, using proven techniques to minimize estate and gift taxes and assist with transitioning wealth to the next generation. He has significant experience in the use of charitable entities to minimize income and estate taxes.

In the corporate arena, Jay has extensive experience in business succession planning and asset protection. He works with clients to develop and implement an effective plan to transition ownership to partners, family members or key employees.

At Shulman Rogers, Jay leads the Firm's Trusts and Estates Department and serves on the Firm's Board of Directors. In the legal community, he chairs the Estates and Trusts section of the Bar Association of Montgomery County, Maryland and serves on the Section Council of the Maryland State Bar Association's Trusts and

### PRACTICE AREAS

Estates, Trusts and Elder Law  
Tax Law  
Exempt Organizations

### EDUCATION

Georgetown University Law Center, L.L.M. in Taxation, *Honors*: With Distinction, 2000  
George Washington University Law Center, J.D., 1990  
University of Delaware, B.A., 1987

### BAR & COURT ADMISSIONS

District of Columbia  
Maryland  
Virginia

### HONORS & AWARDS

The Best Lawyers in America

Jay M. Eisenberg (Continued)

Estates Section. Through the years, Jay has chaired the Planned Giving Committee of the Hebrew Home of Greater Washington, and served on the Board of Directors of Montgomery Hospice and the American Red Cross - National Capital Chapter.

Jay was recently invited to The American College of Trust and Estate Counsel, a national organization that elects lawyers to membership who demonstrate the highest level of integrity, commitment to the profession, competence and experience as trust and estate counselors. ACTEC has a limited membership of 2,600 lawyers nationwide, with less than 50 Maryland attorneys receiving the recognition.

Recognized by *Washingtonian Magazine* as one of the top 1% of estate planning attorneys in the MD/DC/VA area, Jay lectures extensively on estate and trust planning issues for the World Bank, the American Red Cross, Jewish Federation of Greater Washington, Suburban Hospital, Holy Cross Hospital, Sun Trust Bank, Merrill Lynch and other select institutions. He has also published various articles on estate planning issues, including *Revocable Trust or Will - A Streamlined Choice*.

## **NEWS**

Three Shulman Rogers Attorneys Named to Washingtonian Magazine's 2017 Top Lawyers Listing

Shulman Rogers Attorneys Honored by Inclusion on 2017 Best Lawyers Listing

Shulman Rogers Attorneys Honored by Inclusion on 2016 Maryland and Washington DC Super Lawyers Listings

Shulman Rogers Attorneys Honored by Inclusion on 2015 Washingtonian Top Lawyers Listing

Shulman Rogers Attorneys Honored by Inclusion on 2016 Best Lawyers Listing

*Washingtonian Magazine*, Top Trust and Estates Lawyers, 2012, 2013, 2014, 2015, 2017

Maryland Super Lawyers, 2007 - 2018

Jay M. Eisenberg (Continued)

Shulman Rogers Attorneys Honored by Inclusion on 2015 Best Lawyers Listing

Shulman Rogers Attorneys Honored by Inclusion on 2015 Maryland Super Lawyers Listing

Jay Eisenberg quoted in Bethesda Magazine

#### **PUBLICATIONS**

Revocable Trust or Will -- A Streamlined Choice

#### **EVENTS**

Trust and Estate Lunch Presentation

November 15, 2012

#### **SEMINARS & SPEAKING ENGAGEMENTS**

Lecturer, Estate and Trust Planning Issues, American Red Cross, Jewish Federation of Greater Washington, Suburban Hospital, Holy Cross Hospital, Sun Trust Bank, Merrill Lynch, and Other Select Institutions

#### **PROFESSIONAL & COMMUNITY AFFILIATIONS**

Bar Association of Montgomery County, MD, Estates and Trusts Section, Chair

Suburban Hospital Planned Giving Committee, Member

Montgomery Hospice, Past Member, Board of Directors

American Red Cross National Capital Chapter, Past Board Member

Hebrew Home of Greater Washington Steering Committee, Past Member

Maryland State Bar Association, Estate and Trusts Section, Member

Alpha Epsilon Pi