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Daniel B. Axman

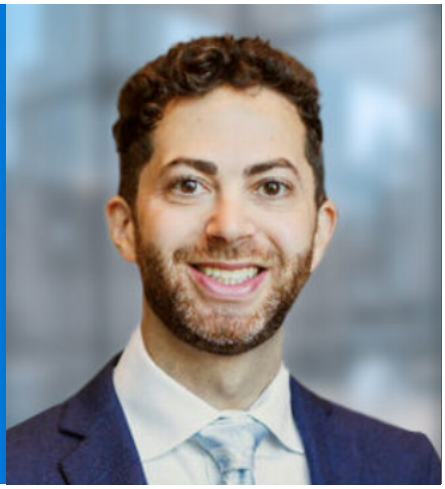
Partner

Contact

New York

P 212.907.7379 | **F** 212.754.0330

daxman@spencerfane.com



Overview

Daniel Axman provides thoughtful and strategic tax, trusts, and estates counsel to individuals, families, and business owners on a broad range of matters involved with setting up efficient and beneficial transfers of wealth. His practice focuses on tax planning, preserving family harmony, creditor protection, business succession, estate and trust administration, probate, charitable planning, and resolving federal and state tax disputes, including audits and litigation involving trusts and estates.

Daniel regularly represents clients in both planning and controversy matters, helping them navigate complex legal and financial issues with clarity and confidence. He has advised a wide array of clients, including families, individuals, and executives in the real estate, legal, health care, finance, entertainment and hospitality, and nonprofit industries. Clients value his thoughtful counsel, deep technical knowledge, and ability to craft customized solutions that align with both personal goals, long-term financial objectives, and the realities of family dynamics.

Before entering private practice, Daniel began his career at a Big Four accounting firm, where he gained valuable experience in tax advisory, corporate structuring, and international tax compliance.

Education

- Washington University School of Law (LLM)
- Washington University School of Law (J.D.)
- Binghamton University School of Management (B.S.), *magna cum laude*

Bar Admissions

- New York
- New Jersey
- Florida

- North Carolina

Community Involvement

- HIAS, Volunteer
- Fresh Art, Inc., Board Member

Distinctions

- *Lawdragon 500*, Leading Family Lawyers for Excellence in Trusts and Estates, 2026
- *New York Metro Super Lawyers*, 2025-2026

Presentations and Publications

- "New IRS Discharge of Estate Tax Lien Procedure," *com,* December 2016
- "Moved to Florida, but Still Can't Let Go of New York – Will Your Estate be Subject to New York Estate Tax?" *Lexology*, April 2016
- "IRS Eases Administrative Oversight of ABLE Accounts," *Lexology*, December 2015
- "Receiving a Deduction for Your Charitable Contribution on Giving Tuesday," *Lexology*, December 2015
- "Trusts and Estates Attorney Panel and Networking Reception," Cardozo School of Law, November 2024, 2023
- "2015 Estate, Gift and Tax Updates," WestLegalEdcenter, December 2015
- "Cutting Edge Topics in Estate Planning," Brooklyn Bar Association, January 2015
- "Same Sex Marriage: Changing Tides in the U.S., and the Impact on Estate Planning," WestLegalEdcenter, October 2014

Related Experience

- Implemented creative income, gift, generation-skipping transfer, and estate tax transfer solutions through trust planning, loans, and other wealth transfer mechanisms.
- Advised family members and the executors/trustees of deceased clients' estates on estate and trust administration issues.
- Advised organizations and individuals on the formation of charitable corporations and trusts and the ongoing compliance issues.
- Advised clients on the U.S. tax compliance relating to gifts from non-U.S. persons and distributions from foreign trusts.
- Advised clients on valuations of family-owned businesses and real estate.
- Advised family-owned businesses on succession issues.
- Advised clients on marital agreements.
- Advised banks and individual clients on lending transactions involving trusts.
- Requested private letter rulings from the IRS for clients' complex tax issues.
- Advised clients on placing cooperative apartments, condos, Florida homesteads, and other real estate in trusts and LLCs.
- Advised clients on tax-free exchanges of real estate.
- Advised clients on the tax treatment of retirement accounts.
- Advocated for beneficiaries to assert and protect their inheritance rights.
- Advocated for spouses to assert and protect their inheritance rights.
- Advised trustees on strategies to safeguard themselves from claims brought by beneficiaries.
- Represented beneficiaries and fiduciaries in wills, trusts, and estate disputes, including Surrogate's court litigation.