



CREATIVE PLANNING

Title: Cross-Border Estate Planning Attorney

Location: USA

Job Description: **JOB SUMMARY**

The primary responsibility of the **Cross-Border Estate Planning Attorney** is to help clients with cross-border estate planning needs, including accurate and coordinated estate plans that align with their wishes while accounting for both U.S. and foreign legal considerations. This role focuses on U.S.-based estate planning for clients with international ties and requires close collaboration with foreign counsel to ensure the overall estate plan functions properly across jurisdictions.

The Cross-Border Estate Planning Attorney will serve as the primary advisor for the U.S. side of international estate planning matters, particularly for clients with assets, residency, beneficiaries, or planning considerations spanning multiple countries. A highly successful attorney in this role can simplify complex international estate planning concepts for clients while collaborating effectively with foreign advisors and maintaining a high level of technical accuracy.

We do not accept resume submissions from third-party recruiters or staffing agencies. Please contact our recruiting team directly.

JOB DUTIES

- Serves as the primary point of contact for international estate planning clients regarding U.S. estate planning matters
- Advises clients on U.S. estate planning strategies involving international assets, beneficiaries, residency, and tax considerations
- Collaborates closely with foreign estate planning attorneys and advisors to ensure coordinated and effective cross-border estate plans
- Drafts and reviews sophisticated estate planning documents with a high degree of accuracy
- Explain complex domestic and international estate planning concepts clearly and effectively to clients
- Assists in identifying and addressing potential cross-border estate, gift, trust, and inheritance planning issues
- Maintains responsiveness to client questions and communications with same day or same day offer timing of response
- Displays a positive attitude and willingness to adapt in a rapidly changing environment

- Works collaboratively with internal wealth management teams and outside professional advisors
- All other duties as assigned

REQUIRED EXPERIENCE / QUALIFICATIONS

- Juris Doctorate
- Licensed and in good standing with the bar of at least one state
- 7+ years of estate planning or related experience
- Experience handling U.S. estate planning matters involving international or cross-border considerations, including familiarity with U.S./UK cross-border estate planning matters
- Ability to collaborate effectively with foreign counsel and advisors
- Ability to present complex estate planning concepts to clients in a clear and practical manner
- Ability to draft and review estate planning documents with a great degree of accuracy

PREFERRED EXPERIENCE / QUALIFICATIONS

- LL.M. in Taxation or Estate Planning
- Experience working with high-net-worth or ultra-high-net-worth clients
- Licensed and in good standing with the bars of more than one state

TECHNICAL SKILLS:

- Proficiency in Microsoft Office preferred

Salary Range: starting base up to \$150k