



## DANIEL P. FITZGERALD

### Background

Daniel P. Fitzgerald is a Principal in Cummings & Lockwood's Private Clients Group and Principal-in-Charge of the Greenwich office. His practice focuses on estate planning, estate administration, taxation, partnerships, probate litigation and defending tax audits. Dan's extensive estate administration experience allows him to develop estate plans that address issues and concerns before they become problematic.

He has worked with a broad range of finance, accounting, hedge fund and private equity professionals, as well as artists and entrepreneurs. Dan has developed comprehensive estate plans to assist members of many generations in their wealth transfer protection and planning.

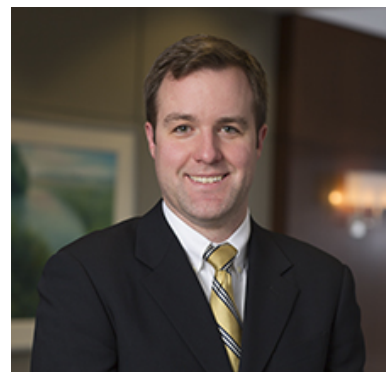
Dan is the Chair of the Firm's Marketing Committee and former principal-in-charge of the Firm's Continuing Legal Education Program and the Private Clients Group Associate Training Program.

### Practice Areas

- Private Clients Group
- Wills, Trusts and Estate Planning
- Probate and Estate Administration
- Fiduciary and Trustee Services
- Wealth Protection Planning
- Philanthropic Giving
- International Estate and Tax Planning
- Business Succession Planning
- Estate Planning for Hedge Fund and Private Equity Principals
- Estate Planning for Corporate Executives
- Estate Planning for Collectors, Authors, Artists and Musicians
- Tax Controversy and Litigation
- Family Office and Closely Held Business Group

### Education

- New York University School of Law (LL.M. in Taxation, 2009)
- Syracuse University College of Law (J.D., *cum laude*, 2006)



**Daniel P. Fitzgerald**

**Principal**

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# CUMMINGS & LOCKWOOD LLC

- Lafayette College (B.A., 2003)

## Bar Admissions

- New York, 2007
- Connecticut, 2006
- United States Tax Court

## Professional Organizations

- Connecticut Bar Association
- New York Bar Association
- Greenwich Bar Association

## Professional Recognition

- Chambers and Partners, High Net Worth Guide - Up and Coming 2024
- The Best Lawyers in America, 2019 - Present
- Connecticut and New England Super Lawyers, Rising Star in Estate Planning, 2011 - Present
- Connecticut Law Tribune, New Leaders in the Law, 2013
- Fairfield County Business Journal, "40 Under 40" Award, 2012

## Civic and Philanthropic Activity

- Greenwich Bar Association, President, 2013 - 2014, Officer, 2007 - 2015
- Greenwich Hockey Club, Board Member, 2021-Present
- Greenwich United Way, Board Member, 2015 - 2021
- Fairfield County's Community Foundation, Professional Advisors Council, Member
- Meals-on-Wheels, Inc. of Greenwich, Board Member, 2007 - 2017

## Articles/Publications/Presentations

- Connecticut Dynasty Trusts and Directed Trusts
- Incapacity, Powers of Attorney and Adoption in Connecticut, 4th Edition, co-author, Thomson Reuters
- Unhappy with the Terms of a Trust? Decanting the Problem Away
- 10 Tips for Establishing Domicile in a Tax-Friendly Jurisdiction
- Living Will and Appointment of Health Care Representative, Connecticut, Practical Law Guide, co-author, Thomson Reuters
- Advance Health Care Directive, Connecticut, Practical Law Guide, co-author, Thomson Reuters
- "Charitable Remainder Trust Pitfalls", Trusts and Estates Magazine, October 2015, co-authored with Conrad Teitell and Heather Rhoades