



# Tracy L. McLaughlin

PARTNER

An attorney and Certified Financial Planner™, Tracy assists clients with general estate planning, including wills and trusts, lifetime gift planning, estate administration, tax-efficient wealth transfer planning, and charitable planning.



## Practices

Private Clients, Trusts & Estates  
— Charitable Planning  
— Estate Planning  
— Tax-Exempt Organizations  
— Wealth Transfer Strategies

## Education

St. John's University School of Law, JD, summa cum laude, 2009  
United States Military Academy, BS, 2001

## Offices

New York

## Phone

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Before joining ArentFox Schiff, Tracy was a financial advisor with a registered investment advisory firm. Drawing on this experience, she understands how the estate plan fits within a client's overall financial strategy. She was also an associate in the New York office of an elite international law firm. Tracy is a combat veteran as well, serving five years in the United States Army.

## Boards, Memberships & Certifications

- New York City Bar Association's Committee on Estate and Gift Taxation, Secretary
- New York City Bar Association, Member
- Certified Financial Planner (CFP®)
- Notary Public
- Board of Governors for the West Point Society of New York, Member
- Friends of NYCCPALL Inc., a supporting 501(c)(3) organization, Executive member

## Publications, Presentations & Recognitions

### Publications

— "AI in Family Offices: The Risks of Relying on AI for Decision-Making and Client Services,"  
*The National Law Review* (Aug. 6, 2024)

— "AI in Family Offices: A Closer Look at Privacy, Confidentiality, and Fiduciary Responsibility,"?

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“Taxation of Non-Grantor Trusts,” *Estate Planning*, Thomson Reuters (Dec. 2022)

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“Late Allocation of GST Exemption and Fixing Past Mistakes,” *Estate Planning* (Nov. 2022)

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“Insurance Trusts and GST – A Primer,” *Estate Planning*, Thomson Reuters (Nov. 2021)

### **Presentations**

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“Artificial Intelligence and its Impact on Trusts and Estates Practice and Family Offices,” NYSSCPA 2024 Annual Private Wealth Conference, New York (Dec. 12, 2024)

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“Decanting A Trust: What, How, Why and Why Not,” ABA Section of Real Property, Trust and Estate Law, Webinar (Jul. 25, 2024)

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“The Generation-Skipping Transfer Tax: Back to Basics,” 35TH Annual RPTE National CLE Conference, Washington, DC (May 12, 2023)

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“Generation-Skipping Transfer Tax,” American Bankers Association, Wealth and Trust School - Level 2, Atlanta, GA (Mar. 21, 2023)

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“An Introduction to the Generation-Skipping Transfer Tax,” American Bar Association, Real Property Trusts and Estates Law Section, Webinar (Mar. 7, 2023)

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“Generation-Skipping Transfer Tax: Key Concepts and Reporting Issues,” NYSSCPA 2022 Annual Private Wealth Conference, New York (Dec. 7, 2022)

### **Recognitions**

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— Best Lawyers: Ones to Watch, *Best Lawyers* (2021-2024)

— New York Metro Rising Star, *New York Super Lawyers*, Thomson Reuters (2020)

— Outstanding Pro Bono Service Award, City Bar Justice Center (2020)

## **Celebrating ArentFox Schiff’s Veterans: Tracy McLaughlin on Going From Military Service to Client Service**

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In 1997, Tracy earned a Congressional nomination to attend the US Military Academy at West Point. After graduating in 2001, she was commissioned as a Second Lieutenant in the US Army Adjutant General Corps. In 2004, she was deployed to Tikrit, Iraq, as a Chief of Casualty Operations Officer. Two years later ? after five years of service ? Tracy was honorably discharged as a Captain.

[Read more](#)

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### **Bar Admissions**

[New York](#)