

# Stevens & Lee

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## Rubeena S. Sehgal

Shareholder

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## Areas of Focus

### Practice

Wealth Planning, Trusts and Estates

Rubeena serves as a strategic ally to a range of individuals and business owners in tax and estate planning, particularly with issues and approaches involving estate and trust administration, gift and generation-skipping tax matters, nonprofit organizations, guardianships and estate and trust litigation.

With a depth of experience in the preparation of wills and trusts, Rubeena helps clients leverage various opportunities for favorable tax planning purposes, including grantor retained annuity trusts, spousal lifetime access trusts, qualified personal residence trusts, qualified domestic trusts and supplemental needs trusts. When disputes arise, she assists with non-judicial settlement agreements and litigates estate, trust and trust termination issues.

Rubeena also advises fiduciaries on estate and trust administration and assists with reviewing and preparing documents for probate and administration proceedings. Her experience includes preparing gift and estate tax returns, formal and informal accountings, receipts and releases for estate and trust distribution as well as pragmatically navigating audit and tax issues with the IRS.

In the area of non-profit formation, she represents private and public organizations, foundations and charities with federal applications for tax-exempt status and state charitable registration filings.

As a thought leader in her field, Rubeena lectures on issues and developments regarding estate planning and estates and trust administration.

## Representative Experience

- Obtained favorable income tax letter ruling from New York State for New Jersey clients stating that the ownership of a private residential club would not be considered a “permanent place of abode” under New York residency statutes.
- Secured favorable IRS tax exemption determination letter for the Doris Wilderness Foundation, a 7,200-acre preserve in central Belize that protects rare neotropical forest and flora.

## Education

- New York Law School, J.D.
- Rutgers University, B.S., Accounting

## Bar Admissions

- New Jersey
- New York

## Court Admissions

- U.S. Tax Court