



Eric Kaplan

Senior Counsel

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Eric Kaplan is senior counsel in the International Wealth and Asset Planning group at Greenspoon Marder LLP. He focuses his practice on estate planning, asset protection and taxation.

Mr. Kaplan brings with him almost two decades of extensive knowledge and experience with comprehensive estate planning, domestic-based asset protection as well as offshore asset protection.

Mr. Kaplan has written extensively and been published in the areas of estate planning, asset protection and integrated estate planning. He was a contributing author to the third edition of *Asset Protection Planning Guide*, published in 2014 by CCH Incorporated, after also having significantly contributed to the second edition in 2005. His other published works can be found in *Estate Planning, Insights and Strategies*; *Journal of Practical Estate Planning*; *Journal of Financial Planning*; and *Journal of International Taxation*.

After receiving a Bachelor of Arts degree in United States History in 1995 from the State University of New York at Albany, Mr. Kaplan earned his Juris Doctor degree in 1998 from Quinnipiac University School of Law and then moved to Colorado to practice. He is a member of the Colorado Bar Association.

Bar Admissions

- Colorado

Education

- J.D., Quinnipiac University School of Law, 1998
- B.A., State University of New York at Albany, 1995

Practice Areas

- International Wealth & Asset Planning
- International
- Wills, Trusts & Estates

Professional and Community Involvement

- Colorado Bar Association, Member
- Adams County Bar Association, Member
- Master networks, Member, 2019-2020
- Firestorm – Lone Tree Chapter, Member, 2017-2019

- Centennial Estate Planning Council, Member, 2011-2016

Speaking Engagements

- Presenter, "Asset Protection and Comprehensive Estate Planning in Today's Environment," Webinar, American Academy of Attorney-CPAs 2024 Fall Education Conference, November 7, 2024

Publications

- Co-Author, "Asset Protection for High-Risk Professionals" *Wealthcounsel Quarterly*, Fall 2024
- Author, "Tax Compliance for Integrated Estate Planning Trusts," *Estate Planning*, a Thomson Reuters publication, August 2023
- Author, "Why Foreign Limited Liability Companies are Ultimately More Protective than Domestic Limited Liability Companies," *Estate Planning*, a Thomson Reuters publication, July 2023
- Author, "Why Foreign Asset Protection Trusts are Ultimately More Protective than Domestic Asset Protection Trusts," *Estate Planning*, a Thomson Reuters publication, April 2023
- Co-Author, "Complex Estate Planning Strategies for High Net Worth Clients," *Estate Planning*, a Thomson Reuters publication, February 2023
- Co-Author, "Using Third-Party Trusts for Asset Protection" *Wealthcounsel Quarterly*, Winter 2022
- Author, "Alabama Supreme Court Remands Case Back To Trial Court To Determine Whether A Limited Liability Company Member Should Be Held In Contempt Of Court For Failure to Abide By The Terms Of A Charging Order" GM International Wealth & Asset Planning Blog, January 3, 2022
- Author, "Amendments To The Tennessee Investment Services Act And Tennessee Uniform Trust Code" GM International Wealth & Asset Planning Blog, June 2, 2021
- Co-Author, "Irrevocable Trusts," Colorado Estate Planning Handbook, October 2020
- Co-Author, "Irrevocable Trusts," Colorado Estate Planning Handbook, Seventh Edition, February 2019
- Contributing Author, "Asset Protection Planning Guide: A State-of-the-Art Approach to Integrated Estate Planning," Third Edition, CCH Incorporated, January 2014
- Co-Author, "Recent Developments in Asset Protection," *Estate Planning*, April 2013 (Part I) and May 2013 (Part II)
- Co-Author, "Domestic Asset Protection Trusts and Implications of the Mortensen Case," *Insights & Strategies*, August 2012
- Co-Author, "Exercise of Jurisdiction by U.S. Courts Over Foreign Defendants Based on Internet Presence: Implications for Foreign Asset Protection Trusts," *Insights & Strategies*, January 2011
- Co-Author, "You Created a Trust—So Now What?" *Journal of Practical Estate Planning*, June-July 2009
- Co-Author, "Recent Developments in Contempt Law Involving Offshore Trusts," *Insights & Strategies*, April 2009
- Co-Author, "Third Party Trusts: Tax Benefits and Asset Protection," *Journal of Financial Planning*, November 2007
- Co-Author, "A Guide to Foreign Irrevocable Life Insurance Trusts," *Journal of International Taxation*, February 2005
- Co-Author, "Incorporating Offshore: A Tax and Asset Protection Guide," *Journal of International Taxation*, June 2003
- Co-Author, "Protecting the Dental Practitioner's Assets," *Colorado Dentistry*, May 2002
- Incomplete Gift Non-Grantor Trust Issues in California and New York
- 2023 Amendment to Delaware's Qualified Dispositions in Trust Act
- Termination of California's Beneficial Income Tax Loophole Pertaining to Incomplete Gift Non-Grantor Trusts
- Tax Compliance for Integrated Estate Planning Trusts Published in *Estate Planning*
- Arkansas Becomes The 21st State to Adopt Domestic Asset Protection Trust Laws
- Boo! You're A Billionaire. Scariest Issues You Might Encounter If You Win the Lotto
- Corporate Transparency Act – Beneficial Ownership Information Reporting Requirements
- Feeling lucky? Our Six Tips On What To Do If You Win The Lottery – Part 3
- Greenspoon Marder International Wealth & Asset Planning Blog: Tenth Circuit Court of Appeals Allows Additional Remedy To Prevent a Judgment Debtor From Hiding Behind a Charging Order

- Greenspoon Marder International Wealth & Asset Planning Blog: Alabama Supreme Court Remands Case Back To Trial Court To Determine Whether A Limited Liability Company Member Should Be Held In Contempt Of Court For Failure to Abide By The Terms Of A Charging Order
- Alabama's Qualified Dispositions in Trust Act
- Whether a Trust Distribution Provision Conditioned Upon a Child's Marriage Status Is Void Against Public Policy as an Impermissible Restraint Against Marriage
- Greenspoon Marder International Wealth & Asset Planning Blog: Amendments to the Tennessee Investment Services Act and Tennessee Uniform Trust Code
- Greenspoon Marder International Wealth & Asset Planning Blog: Essential Update to Partnership Agreements, Multi-Member Limited Liability Company Operating Agreements and More
- International Wealth and Asset Planning Group Annual Client Letter
- Greenspoon Marder International Wealth & Asset Planning Blog: Previous Loophole in South Dakota's Qualified Dispositions in Trust Act May Result in Ex-Spouse Losing Billions of Dollars

News

- Greenspoon Marder Promotes Attorney Eric R. Kaplan to Senior Counsel
- Greenspoon Marder International Wealth & Asset Planning Blog: Amendments to the Tennessee Investment Services Act and Tennessee Uniform Trust Code
- International Wealth and Asset Planning Group Annual Client Letter

Videos

- Asset Protection and Comprehensive Estate Planning in Today's Environment