



DIRK M. SIMPSON

PARTNER

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BIOGRAPHY

Dirk M. Simpson advises business owners, executives, investors, professionals, and high-net-worth individuals and families in connection with estate planning, complex tax and administration issues relating to inter-generational wealth transfer, asset protection planning, charitable planning, and the structuring and transitioning of closely held businesses.

Client Experience

- Clients looking to develop customized estate plans that integrate their vision values with proactive estate and income tax planning
- Executors and trustees requiring experience and guidance to navigate challenging family dynamics
- Executors and trustees administering estates and trusts involving closely-held businesses and those with significant real estate holdings
- Business owners and entrepreneurs seeking to grow and protect their company and personal assets. This involves a focus on business exit planning, with shareholders and partners requiring independent individual counsel for resolving differences in situations involving conflicts of interest

COMMUNITY & PROFESSIONAL

- Temple University College of Science & Technology, Adjunct Faculty, External Advisory Board, Professional Science Master's in Bioinnovation
- Sbarro Health Research Organization, Director

HONORS

Best Lawyers, 2024

- Trusts and Estates

EDUCATION

LL.M., Taxation, Villanova University
Charles Widger School of Law, 2003

J.D., Villanova University Charles
Widger School of Law, 1999

B.A., *cum laude*, Colgate University,
1996

ADMISSIONS

Pennsylvania
New Jersey

- Philadelphia Estate Planning Council, Member

REPRESENTATIVE EXPERIENCE

- Implemented personalized estate plans for hundreds of clients over the past 20 years.
- Represented C-suite executives and closely-held business owners with estate planning and asset protection involving the transfer of company equity to irrevocable trusts.
- Counseled non-resident aliens with U.S. based-assets as well as U.S.-resident taxpayers with foreign assets in estate planning matters.
- Created several charitable structures, including the conversion of a private equestrian training facility into an IRS-approved private operating foundation providing equine therapy.
- Counsel and board member of a 501(c)(3) medical research institute that is commercializing medical research through an innovative public-private corporate structure that facilitates commercialization by nonprofits.

PRACTICE FOCUS

- Gift, Estate, and Generation-Skipping Transfer Tax Planning
- Estate and Trust Administration
- Wills, Revocable Trusts, & Irrevocable Trusts
- Business Succession Planning
- Business Formation
- Asset Protection Planning

INDUSTRIES

- Private companies
- Real estate owners and developers
- Life sciences
- Family offices, banks, and trust companies
- Public charities and private foundations

NEWS

Best Lawyers in America Recognizes Six Practices in New York and Pennsylvania in its "Best Law Firms" Report for 2024

Firm News, *Best Lawyers*®, November 2, 2023

Twenty-three RCCB Attorneys Recognized in 2024 Edition of the Best Lawyers in America

Firm News, *Best Lawyers*, August 17, 2023

RCCB Partners Speak at Venture Café's Israeli Startup Lounge

Firm News, July 26, 2023