



Patricia Galteri

Managing Attorney

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Practice Areas

Wills, Trusts & Estates Law

Business Succession Planning

Education

Hofstra University School of Law
J.D., 1983

Hofstra University
B.B.A., 1980

Memberships

New York State Bar Association

Nassau County Bar Association

Suffolk County Bar Association,
Tax Committee, Former Chair

Nassau County Estate Planning Council

Long Island Community Foundation,
Ambassador

Northwell Health Systems,
Gift Planning Advisory Committee

Bi-County Committee of Attorneys and
Accountants, Former Chair

US Trust Professional Advisors Council

Huntington Hospital, Board of Directors

Long Island Association, Board of Directors

Admissions

New York State

United States Tax Court

Patricia Galteri serves as Managing Attorney of Meyer, Suozzi, English & Klein, P.C. and Chairs the firm's Management Committee.

In addition to her management role, Ms. Galteri is Chair of the firm's Wills, Trusts & Estates Department. Her practice includes the development of estate and family business plans to ensure the tax efficient transfer of wealth to the next generation while meeting the specific personal goals of her clients. She implements such plans through the use of wills and grantor trusts, irrevocable life insurance trusts, generation skipping trusts, grantor retained annuity trusts and other arrangements designed to transfer property at little or reduced gift tax cost to selected beneficiaries. Nomination of agents under Powers of Attorneys and Health Care Proxies also play an important role in effecting her clients' intentions.

In addition, Ms. Galteri supervises the preparation of probate and administration documents, provides advice in the marshaling and preservation of estate assets, and she is knowledgeable in all aspects of estate administration and post-mortem estate tax planning. Her in-depth knowledge of the preparation of federal and state estate tax returns enables her to defend positions on gift and estate tax returns under audit. Ms. Galteri is called upon to appear in Surrogate's Court to provide counsel to fiduciaries and beneficiaries, in the interpretation of ambiguities in wills and trusts in construction proceedings and to participate in contested probate and accounting proceedings.

Notable experience includes:

- Counsels several prominent high net-worth individuals and founders of several family businesses on Long Island in their estate planning matters.
- Engages in dynastic trust planning for high net-worth individuals.
- Defends gift and estate tax audits with complex valuation issues.
- Instrumental in bringing highly contested estate and trust accounting proceedings to settlement.

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Ms. Galteri is frequently called upon by the media to comment on new developments in gift and estate tax law, and she has authored a chapter titled "Preparing an Appropriate Strategy" for a Thomson Reuters publication, *Beginning the Estate Planning Process*.

In 2021 and 2022, Ms. Galteri was selected as one of New York's Top Rated Family Lawyers featured in *New York Magazine* and *New York Law Journal*. In 2019, Ms. Galteri was recognized as one of the Long Island Herald's Top Lawyers of Long Island. Also in 2019, she was honored at The Premier Business Women of Long Island Awards Gala. In 2017, Ms. Galteri received the Hofstra Outstanding Women in Law Award, which recognizes women who make meaningful and inspiring contributions to the legal community. Ms. Galteri was honored by Hofstra again as she was inaugurated into the Hofstra Hall of Fame in April 2022. In 2016, 2017 and 2020, Ms. Galteri was named to the *New York Super Lawyers* list as one of the top attorneys in New York. In 2023, *Long Island Business News* recognized Ms. Galteri among their Influencers of Law and then selected her for induction to their prestigious Hall of Fame. She was named to the 2022 Power 25 in Law, the Most Powerful Women 2022 and presented as a 2022 Executive Circle Honoree. Schneps Media named Ms. Galteri as a Power Woman of Long Island in 2021. In 2013, Ms. Galteri was cited for excellence by Five Star Professional for her work with high-net worth clients. According to Five Star Professional, 1300 attorneys in the metropolitan area were considered for the recognition and just 333 were nominated by peers or other professionals. Of those, only nine, less than 1% were selected to receive the award. In 2018 and 2012, Ms. Galteri was recognized as one of Long Island's Top 50 Influential Professional Women by *Long Island Business News* and was recognized for her pro bono efforts on behalf of the Coalition Against Domestic Violence. She is also rated "AV Preeminent" by Martindale-Hubbell, the highest level in professional excellence. She was also recognized by *Long Island Pulse Magazine* in 2010 and 2011 as one of the region's "Top Legal Eagles."

Formerly Chair of the Long Island Community Foundation, Ms. Galteri now serves as trustee emeriti for this organization, making grants to organizations found to respond to community need efficiently. Ms. Galteri also serves on the Northwell Health Board of Advisors and Huntington Hospital Board of Directors since April 2020 as well as the Long Island Association's Advisory Board since March 2019.

Prior to joining the firm, Ms. Galteri worked as a staff attorney in the Tax Department at one of the "Big Five" accounting firms in New York City, performing tax research for high net worth executives and multi-million dollar public and private companies.