



Wendy Wolff Herbert

Partner

wheber@foxrothschild.com



Princeton, NJ

Tel: 609.896.4583

Fax: 609.896.1469

Wendy advises individuals and businesses in a wide range of estate planning and tax matters.

She focuses her practice on strategic planning for the transition of wealth from one generation to the next and on business succession planning. She also has a depth of experience in handling tax controversies, advising and representing individuals and businesses before the IRS.

Wendy currently serves as the Administrative Partner for Taxation & Wealth Planning in the Princeton office. Among the services she provides to clients are:

- complex estate and gift planning
- estate and trust administration
- federal and state tax controversies
- tax issues of nonprofit organizations

Wendy is also a frequent lecturer on various tax, estate and probate topics. She presents seminars for community organizations and professional education programs for attorneys and accountants.

Services

- Taxation & Wealth Planning
- Federal Estate & Gift Tax Planning
- Trust & Estate Law & Administration
- Tax Controversy & Litigation
- Nonprofit Organizations

Before Fox Rothschild

Wendy served as a judicial clerk for the Honorable Barry T. Albin, an Associate Justice of the New Jersey Supreme Court.

Beyond Fox Rothschild

Wendy serves on the board of directors of Dress for Success-Central New Jersey, a nonprofit that empowers women to achieve economic independence by providing a support network, professional attire and development tools to help them thrive. She is also a member of the Professional Advisors Committee of the Princeton Area Community Foundation.

Wendy is also a former member of the Board of Trustees of Daytop Village of New Jersey, a charitable organization providing comprehensive substance abuse treatment and education programs for adolescents and young adults.

She previously served on the Advisory Committee of Crawford House, a charitable organization providing transitional housing and treatment to women in early recovery from addiction to drugs and alcohol.

Bar Admissions

- New Jersey
- Pennsylvania

Court Admissions

- U.S. Tax Court

Education

- University of Pennsylvania Law School (J.D., *with honors*, 2003)
 - Associate Editor of the Journal of Labor and Employment Law
 - Recipient of the Gordon A. Block Award for outstanding work in wills and future interests
 - Recipient of the Bernard A. Chertcoff Prize for the highest grade in Taxation
 - Order of the Coif
- Douglass College, Rutgers University (B.A., *with honors*)

Memberships

- American Bar Association
 - Real Property, Probate & Trust Law Section
 - Tax Section
- New Jersey State Bar Association
 - Real Property, Trust and Estate Law Section
 - Taxation Law Section
- Mercer County Bar Association
- Mercer County Estate Planning Council
- Princeton Area Community Foundation
 - Professional Advisors Committee

Board of Directors

- Daytop Village of New Jersey
 - former member, Board of Trustees
- Dress for Success, Mercer County

Publications

September 29, 2021

The Tax Code Could Change Before Year's End: What Can Wealthy Individuals Do Now?

January 25, 2021

NJ Economic Recovery Package Spurs Jobs and Development With Business Tax Incentives

October 13, 2016

**Death of a Death Tax: New Jersey Lawmakers End Estate Tax, Lower Sales Tax and Raise Gas Tax
Taxation and Wealth Planning Alert**

December 17, 2015
Incorporating Retirement Assets Into an Estate Plan
New Jersey Law Journal

July 2013
Why You Need a Will
midJersey Business

May 2011
Charitable Giving Opportunities Under the Tax Relief Act of 2010
Taxation & Wealth Planning Department Alert

March 2009
New Jersey Announces Tax Amnesty Program
Tax & Estates Department Alert

Events

July 20, 2023
Advanced Trusts & Estates: Planning Issues and Problems in Decanting Trusts

October 28, 2021
The Role of the Executor
Zoom Online Video Conference

July 28, 2021
Out with the Old, In with the New: Using Trust Decanting to Adapt to Changed Circumstances
Virtual

March 25, 2021
Role of the Executor
Virtual

March 18, 2021
Role of the Executor
Virtual

October 22, 2020
Role of the Executor
Virtual

July 17, 2020
Out with the Old, In with the New: Using Trust Decanting to Adapt to Changed Circumstances
Virtual

May 21, 2020
CARES Act Tax Solutions: Critical Opportunities for Businesses in the Downturn
Virtual

January 29, 2020
Role of the Executor
Virtual

November 19, 2019

Estate Planning Strategies to Prevent Litigation

Princeton Innovation Center BioLabs

July 25, 2019

Using Trusts As S Corporation Shareholders

The Westin New York at Times Square

July 19, 2019

Out With the Old, In With the New: Using Trust Decanting to Adapt to Changed Circumstances

The Westin New York at Times Square

June 25, 2019

Planning Issues and Problems with Respect to Decanting Trusts

Greenberg & Schulman

June 10, 2019

Estate Planning from A to Z

Hampton Inn South Plainfield - Piscataway

May 9, 2019

Estate Planning Under TCJA

Multnomah Athletic Club

November 1, 2018

Federal Fiduciary Income Tax Workshop

Princeton, NJ

July 27, 2017

Planning Issues and Problems in Respect to Decanting Trusts

The Westin New York at Times Square

June 22, 2017

Trust Decanting, Modification, Dissolution, and Constructive Trusts

Saddle Brook and Princeton, NJ

November 7, 2016

Revocable Living Trusts from Start to Finish

Princeton, NJ

July 28, 2016

Integrating Retirement Assets into the Estate Plan

March 4, 2015

Estate Planning & Financial Planning for Women: Taking Control of Your Financial Future Now

University of Pennsylvania Law School

December 15, 2014

Estate Administration from Start to Finish

Ramada Plaza Hotel

June 19, 2014

Intricacies of Transferring Wealth

Primepoint

June 10, 2013

Oddities and Challenges in Probate Law

Hyatt Regency

March 22, 2013

Scaling the Fiscal Cliff: Implications of Tax and Wealth Planning

February 8, 2013

The 2013 Tax Landscape: Opportunities for Charitable Clients

the Nassau Club

November 8, 2012

CPE Classes for CPAs: Ensuring Domicile of Choice

Primepoint Office

October 11, 2012

ABC's of Building and Protecting Wealth for Women

November 10, 2011

Estate Planning After the Tax Relief Act of 2010

Greenacres Country Club

February 15, 2011

The Tax Relief, Unemployment Insurance Reauthorization and Job Creation Act of 2010, Estate and Gift Tax Planning and the Probate Process

October 22, 2010

Estates 101: The Fundamentals of Estate Planning

Midtown Building, Suite 400

October 6, 2010

Alphabet Soup – QPRTs, CLTs, CRTs, GRATs and FLPs – Estate Planning in 2010

New Jersey Greenacres Country Club

August 12, 2010

Advanced Estate Planning

April 26, 2010

Nuts & Bolts of Elder Law & Estate Administration

October 28, 2009

Still Complicated After All These Years — Estate Planning and Administration with Retirement Benefits

October 28, 2009

Estate Planning and Administration With Retirement Benefits

Greenacres Country Club

November 12, 2008

Fundamentals of Estate Planning and Identification of Potential Will Contests

November 8, 2007

Business Entity Selection: Factors to Consider When Counseling Clients

November 16, 2005

Current Status of Family Limited Partnerships

May 18, 2005

Select Federal Income Tax Issues for Partnerships and Other Pass-Through Entities

News

December 30, 2016

Wills & Estates: The Money Issue

April 22, 2016

New Jersey Estate Tax Debate Thickens: Higher Threshold or Five-Year Phaseout?

October 28, 2015

Own a Business? Plan Your Exit

March 11, 2013

New Partner Yearbook

May 2, 2012

Fox Rothschild Elevates 7 to Partner

May 22, 2010

Attorneys Volunteer to Prepare First Responders' Wills