

Joy Matak, Esq.

Biography:

Joy Matak, Esq. is a Partner at Avelino Law, LLP in the firm's Private Client Services and Tax practice groups. With over two decades of diversified experience as a wealth transfer strategist, Joy has an extensive background in recommending and implementing advantageous tax strategies for multigenerational wealth families, owners of closely held businesses, and high net worth individuals.

Adept at navigating the intricate landscape of estate and business succession, Joy collaborates with multi-disciplinary teams of professionals to craft customized wealth transfer strategy plans to accomplish even the most complicated estate and business succession goals. She also performs tax compliance work including gift tax, estate tax, and income tax returns for trusts and estates as well as consulting services related to transfer tax planning, asset protection, life insurance structuring, and post-mortem planning.

A sought-after resource in her field, Joy was most recently a featured speaker at the 2024 Delaware Trust Conference. She has shared insights through speaking engagements for the Greater New Jersey Estate Planning Council; the New Jersey State Bar Association; the New Jersey Business & Industry Association; ABA Real Property, Trust and Estate Law Section; Wealth Management Magazine; the Estate Planning Council of Northern New Jersey; and the Society of Financial Service Professionals.

Joy is a regular, monthly contributor to *Trusts & Estates* magazine and has authored and co-authored articles for the *Tax Management Estates, Gifts and Trusts (BNA) Journal*; Leimberg Information Services, Inc. (LISI); and *NAEPC Journal of Estate & Tax Planning*, among others, on a variety of topics including wealth transfer strategies, income taxation of trusts and estates, and business succession planning. Joy co-authored a book on the 2017 tax reforms entitled *Estate Planning: Estate, Tax and Other Planning after the Tax Cuts and Jobs Act of 2017*.

Education:

Georgetown University Law Center

With distinction

Master of Laws, Taxation

Vermont Law School

Cum laude

J.D.

Seton Hall University

Cum laude

B.S. Mathematics

Bar Admissions:

New Jersey