Accounting
Tax | Advisory

JOY MATAK, JD, LLM

Partner
Co-Practice Leader, Trusts & Estates
jmatak@saxllp.com

Joy Matak, JD, LLM is a Partner at Sax and Head of the firm's Trust and Estate Practice. She has more than 20 years of diversified experience as a wealth transfer strategist with an extensive background in recommending and implementing advantageous tax strategies for multi-generational wealth families, owners of closely-held businesses, and high-net-worth individuals including complex trust and estate planning.

Joy provides clients with wealth transfer strategy planning to accomplish estate and business succession goals. She also performs tax compliance including gift tax, estate tax, and income tax returns for trusts and estates as well as consulting services related to generation skipping including transfer tax planning, asset protection, life insurance structuring, and post-mortem planning.

Joy presents at numerous events on topics relevant to wealth transfer strategists including engagements for the 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 has authored and co-authored articles for the *Tax Management Estates, Gifts and Trusts (BNA) Journa*l; Leimberg Information Services, Inc. (LISI); and *Estate Planning Review – The CCH Journal*, among others, on a variety of topics including wealth transfer strategies, income taxation of trusts and estates, and business succession planning. Joy recently co-authored a book on the new tax reform law entitled *Estate Planning: Estate, Tax and Other Planning after the Tax Cuts and Jobs Act of 2017*.

Education

- B.S., Mathematics, cum laude, Seton Hall University
- JD, cum laude, Vermont Law School
- Master of Laws, Taxation, with distinction, Georgetown University Law Center

Community

- Member, New Jersey State Bar Association
- Member, Estate Planning Council of Northern New Jersey