



THEODORE J. METZGER

MEMBER - Trust & Estates

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Practice Areas

Trust & Estates
Transactions

Bar Admissions

New York, 1979
New Jersey, 1978

Education

Columbia University

• J.D. - 1978

Honors & Activities:

• Harlan Fiske Stone Scholar

University of Pennsylvania

• B.A. (*magna cum laude*) - 1975

Theodore (Ted) J. Metzger joined Rosenberg & Estis, P.C. in 2021 and is a Member with the firm's Trust & Estates Department.

Metzger's practice spans over 27 years, originally on an of counsel basis and then as a partner. During that time, he has built a substantial trust and estates practice representing both high net worth individuals and families as well as clients of more modest means. Much of the estate planning includes efforts to maximize inter-generational wealth transfers, taking advantage of minority and illiquidity discounts in closely held entities, installment sales to intentionally defective grantor trusts, spousal lifetime access trusts and similar techniques.

Many of Metzger's clients have large real estate interests and/or businesses and we have used creative ways to shift appreciating assets and future appreciation to trusts and other entities benefitting younger generations of beneficiaries. His practice also includes estate administration and post-mortem tax planning. Because many of the firm's clients use us not only for estate planning but for their businesses and other legal needs, Metzger is also conversant in business transactions, commercial and residential real estate transactions (including co-op and condos), leasing, joint ventures and other business matters.

Prior to joining Rosenberg & Estis, Metzger was a Partner with Levy Holm Pellegrino & Drath LLP.

Notable Work

- Within the past two years, played a central role in the firm's representation of two closely held clients in the sale of their businesses (one by an F Reorganization and the other as an asset sale) with aggregate purchase prices totaling over \$200 million dollars.
- Entity restructuring in connection with a \$55 million dollars refinancing of a family owned Manhattan commercial building.

