ArentFox Schiff LLP
Attorneys

Joe Blumberg

COUNSEL

Joe provides specialized guidance to clients on estate planning and tax matters within the Private Clients, Trusts, & Estates practice.

Practices

Private Clients, Trusts & Estates
— Estate Planning
— Wealth Transfer Strategies

Education

University of Missouri School of Law, JD, Order of the Coif, cum laude, 2012

University of Missouri School of Journalism, BA, 2003

Offices	Phone	Email
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As a former newspaper journalist, Joe Blumberg prides himself on the ability to listen, learn, and translate complex subjects into what matters most to clients.

Joe is an attorney in the Private Clients, Trusts & Estates practice with extensive experience in sophisticated estate planning, tax planning, and trust administration. His ability to cultivate multi-generational client relationships through tailored advice and educational initiatives further highlights his commitment to client service.

Joe has built a distinguished career in wealth management and trusts and estates law, marked by his adept handling of complex fiduciary responsibilities and strategic planning. His experience in developing estate plans and tax strategies, including dynasty trusts, GRATs, SLATs, ILITs, and charitable gifts, has helped him meet his clients' needs holistically.

Previous Work

In his recent role as a Senior Fiduciary Officer at a large financial institution, Joe helped lead a team of trust advisors, overseeing fiduciary and risk management for intricate trust and account matters.

At the same time, he served as relationship manager for a substantial client portfolio, catering to ultra-high-net-worth individuals, including CEOs, wealth creators, and multi-generational families. He coordinated comprehensive wealth management services, developing and implementing estate and tax-planning strategies and managing post-death trust administration.

Publications & Presentations

Publications

- "Beneficiary Designations," *Chapter 4, Estate Planning for Retirement Benefits*, Illinois Institute for Continuing Legal Education (IICLE) Handbook, 2023.
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“Handling IRAs After Death,” *Chapter 11, Estate Planning for Retirement Benefits*, IICLE Handbook, 2023 (Co-author).

- “Tax Aspects of Fiduciary Litigation,” *Chapter 17, Litigating Disputed Estates, Trusts, Guardianships, and Charitable Bequests*, IICLE Handbook, 2020 and 2023 (Co-author).
- “Accumulation Trusts Versus Conduit Trusts: New Rules for Old Tools Under the SECURE Act,” *Bloomberg/BNA Tax Management Estates, Gifts, and Trusts Journal*, 45 EGTJ 04, Jul. 2, 2020.
- “51 Flavors: A Survey of Small Estate Procedures Across the Country,” *Probate & Property Magazine*, Vol. 28, No. 4, Jul./Aug. 2014.
- “Charitable Contribution Techniques and Planning,” *Missouri Estate Planning (MCLE deskbook*), 3rd Edition, 2013 Supplement, Chapter 7 (Co-author).
- “Pleading Panic: Pure Emotional Damages as ‘Sickness or Disease’ for Bodily Injury Claims,” *76 Missouri Law Review* 867, 2011.

Presentations

- “Discretionary Distributions: Balancing Trustee Authority and Beneficiary Needs,” Estate Planning Short Course 2025, Illinois Institute for Continuing Legal Education (Co-presenter).
- “Introduction to IRAs,” IICLE Estate Planning Short Course, 2024.
- “SLATs – Drafting Considerations, Gifting Strategy, and Potential Pitfalls,” IICLE Estate Planning Short Course, 2022 (Co-presenter).
- “Drafting IRA See-Through Trust Provisions,” Strafford CLE, 2021, 2022, 2024 (Co-presenter).
- “Small Estate Procedures: 50-state survey & MO recommendations,” Missouri Bar Annual Conference, Probate & Trust Section, 2013.

Life Beyond the Law

Outside of work, Joe enjoys golf, canoe trips, and spending time with his family.

Bar Admissions

Illinois
Missouri