

Joseph G. Dolan

Principal

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Joe Dolan is a principal in Porzio, Bromberg & Newman, P.C.'s Wealth Preservation Department and the founding member of the firm's Tax, Trusts & Estates Practice. Mr. Dolan has been practicing law for 30 years and has more than 30 years of experience working as a professional in the business, financial and tax fields. Mr. Dolan has a rare combination of tax and business acumen and trial experience that makes him unique among Tax, Trusts & Estates attorneys and estate and business litigators.

Mr. Dolan uses his tax knowledge and experience to counsel and advise wealthy individuals, families, professionals, business owners and entrepreneurs in estate planning matters to successfully transfer their wealth from one generation to the next with as little income, and trust administration, estate, gift and generation-skipping transfer tax consequences as possible. Mr. Dolan guides families, Trustees, Administrators and Executors through the probate process and assists with the preparation of federal and state inheritance and estate tax returns and fiduciary income tax returns.

Mr. Dolan also assists clients with the formation of business organizations such as corporations, partnerships and limited liability companies. He assists clients with business governance matters. Mr. Dolan has also counseled clients in connection with the sale or transfer of all or a portion of their business organization.

An accomplished litigator, Mr. Dolan utilizes his litigation experience and skills to successfully represent clients in substantial litigation matters in both federal and state courts. In the course of his experience, Mr. Dolan has represented executors, administrators, trustees, beneficiaries, guardians, incapacitated persons, surviving spouses, and families in estate, trust, guardianship and fiduciary litigation matters. Estate and trust litigation matters frequently involve disputes over family-owned businesses or interests in real property. As such, Mr. Dolan has also represented businesses, business owners, corporations, and Limited Liability Company members in corporate divorce, oppressed minority shareholder, oppressed minority limited liability company members, breach of contract, and commercial disputes in both federal and state courts.

Because of Mr. Dolan's reputation as an attorney who can successfully navigate complicated trust and estate disputes, he is frequently appointed as the Court Appointed Attorney, Guardian and Guardian ad litem, Administrator and Trustee by County Surrogates and Chancery Division Judges in New Jersey.

Joseph G. Dolan Cont.

Recognitions

*No aspect of this or any advertisement has been approved by the Supreme Court of New Jersey. For ranking methodologies, please see **here**.*

- *The Best Lawyers in America*® - Trusts and Estates (2021-2027); Litigation - Trusts and Estates (2024-2027)
- TopVerdict.com - Top 50 Verdicts in New Jersey, *Danish Crown Amba v. Rupari Food Services (*2016)

Memberships

- Morris County Bar Association

News

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- 33 Porzio, Bromberg & Newman Attorneys Recognized by *Best Lawyers® 2027*, Including Two "Lawyer of the Year" Recipients, 8/20/2026
- 26 Porzio Attorneys Recognized in *The Best Lawyers in America®* 2026 Edition; 6 Listed as *Best Lawyers: Ones to Watch®*, 8/21/2025
- Porzio, Bromberg & Newman Becomes Designated Custodian of Stroock & Stroock & Lavan LLP's Estate Planning Documents, 5/07/2025
- 26 Porzio Attorneys Recognized in *The Best Lawyers in America® 2025 Edition*; 6 Listed as *Best Lawyers: Ones to Watch®*, 8/15/2024
- 27 Porzio Attorneys Recognized in *The Best Lawyers in America®*; *Best Lawyers: Ones to Watch®*, 8/17/2023
- 24 Porzio Attorneys Recognized in The Best Lawyers ® in America, 2023 Edition, 8/18/2022
- Congratulations To The 23 Porzio Attorneys Recognized In Best Lawyers® In America, 2022, 8/19/2021
- Porzio Recognized in 2016 Top 50 Verdicts in New Jersey, 5/04/2017
- Porzio's Litigation Practice Profiled by New Jersey Law Journal, 11/15/2016
- $2,125,000 Jury Verdict Awarded to Porzio Client, Danish Crown, 3/21/2016

Articles

- 2027 Federal Tax Numbers: What the New Figures Mean for Your Plan, 11/16/2026
- Quarterly Tax Updates: Timely Takeaways on IRS Audits, Art, Aircraft & Estate Planning, 6/18/2025
- The Accidental Art Collector: Income and Estate Tax Considerations, 6/18/2025
- Use of Private Aircraft: Has the IRS Become Your Copilot, 6/18/2025

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- Quarterly Tax Updates: Key Insights on IRS Developments, Crypto, Estate Planning & More, 2/11/2025
- 2024 Year-End Tax Planning: It's Not Too Late, 12/19/2024
- Quarterly Tax Updates: January 2024, 1/16/2024
- Corporate Transparency Act Becomes Operational, 1/16/2024
- Year-End Tax Tips: 5 Smart Strategies for 2023, 3 Important Changes for 2024, 12/14/2023
- 2023 Q3 Tax Updates, 7/20/2023
- Lessons from the Lynnette Harris and Leigh Ann Conley Cases, 7/20/2023
- Tax Short Shorts, 7/20/2023
- Net Unrealized Appreciation: Opportunities in Your Company's Retirement Plan, 7/20/2023
- More IRS Scrutiny of Hobby Losses, 7/20/2023
- Retirement Report, 7/20/2023
- Qualified Small Business Stock: More Smoke than Fire, 7/20/2023
- 2023 Q2 Tax Updates, 4/27/2023
- A Look At President Biden's Budget Tax Proposals, 4/27/2023
- Crypto Corner, 4/27/2023
- Golden Passports & Moving to Puerto Rico, 4/27/2023
- Tax Shorts, 4/27/2023
- 2023 Q1 Tax Updates, 1/24/2023
- IRS Delays $600 Reporting Threshold, 1/24/2023
- The Far Side, 1/24/2023
- The Silver Lining of Inflation, 1/24/2023
- Understanding the Once-A-Year Rollover Rule, 1/24/2023
- 2022 Year-End Tax Planning , 12/13/2022
- The Complexity of Charitable Contributions, 12/13/2022
- Converting Traditional IRAs to Roth IRAs, 12/13/2022
- Crypto Investments, 12/13/2022
- Delaying Income and Accelerating Expenses, 12/13/2022
- Looking Ahead: Tax Rates, Gift & Estate Exemptions and Tax Legislation, 12/13/2022

- Should You Harvest Losses?, 12/13/2022
- 2017 Year-End Planning Update, 12/13/2017

Speaking Engagements

- "Practical Considerations for Counseling Clients on Potential Probate Litigation," Porzio's Wealth Preservation Symposium, 1/29/2025

Practices

- Wealth Preservation

Area of Focus

- Asset Protection
- Charitable Planning
- Elder Law
- Estate Planning
- Executive Wealth Management
- Guardianship
- Privately-Owned Business Planning
- Probate and Trust and Estate Administration
- Trusts & Estates Litigation

Bar Admissions

- New Jersey, 1992

Court Admissions

- United States District Court, District of New Jersey, 1992
- United States Tax Court, 1996

Education

- *Villanova University Charles Widger School of Law*
  LL.M. in Taxation, 2003
- *Seton Hall Law School*
  J.D., 1992

Joseph G. Dolan Cont.

- *Saint Peter's University*
  B.S., 1986
  magna cum laude