



Robert A. Stewart

Partner

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Practice Areas

Trusts & Estates

Overview

Robert A. Stewart is a partner in the Yardley, Pa. office of Hill Wallack LLP, where he is a member of the Trust & Estates practice group. Mr. Stewart, who also is licensed to practice in New Jersey, works from the firm's Princeton, N.J. office.

He concentrates his practice in the areas of Estate Planning, Estate Administration, Trusts and Trust Administration, and Taxation of Estates and Trusts. Mr. Stewart focuses on the preparation of wills, revocable living trusts, irrevocable life insurance trusts, dynasty trusts, asset protection trusts, charitable trusts, powers of attorney and living wills; creation of family limited partnerships and limited liability companies and the implementation of other wealth transfer and preservation techniques; income tax planning for business owners including the use of tax-qualified retirement plans; preparation of buy-sell, employment, deferred compensation, and stock-bonus agreements; and probate related litigation including will contests, undue influence, fiduciary accountings and audits.

Mr. Stewart is admitted to practice law in Pennsylvania, New Jersey, the United States District Court for Eastern Pennsylvania and the District of New Jersey. He earned his Law Degree from Widener University School of Law and a Master of Laws in Taxation from Villanova University School of Law.

Representative Matters

Obtained relief from penalties assessed against non-profit institution by IRS for failure to timely remit withholding taxes

Preserved the tax-deferred character of more than \$2,000,000 in retirement plan assets for surviving spouse of deceased business owner defeating challenges from IRS and Dept. of Labor

Recovered over \$100,000 for estate beneficiaries from agent who abused power of attorney

Successfully obtained state court approval to reform a decedent's trust to maintain favorable income tax treatment for charitable beneficiaries

Defeated New Jersey Department of Revenue efforts to collect sales tax from purchaser of a commercial vessel successfully arguing vessel was engaged in inter-state commerce and therefore exempt under New Jersey law.

Leadership

Board Member, Historic Gloria Dei Building Preservation Corporation

Presentations & Publications

Presenter, New Jersey Will Drafting Basics, National Academy of Continuing Legal Education (NACLE), (April 2018)

Presenter, Affordable Care Act Reporting for Controlled Employer Groups, Baratz & Associates, P.A., CPAs, (August, 2015)

Presenter, Current Trends in Estate Planning For NJ Residents, Client Food & Wine Tasting Night (May, 2014)

Presenter, Raising an Estate by A Creditor: Who, When & How, Association of Title Examiners, (November, 2012)

Presenter, How To Identify Estate Planning Risks For Business Owners, New Jersey Society of CPAs, (November, 2010)

Author, Portability - The Big Beautiful Bill

Bar Admissions

Pennsylvania

New Jersey

United States District Court for Eastern Pennsylvania

District of New Jersey

Education

St. Joseph's University

Widener University School of Law

Villanova University School of Law