



# Nicolas J. Sasso

*of counsel*

Nic serves as of counsel in the firm's Estate Planning and Wealth Preservation practice group. He brings a depth of experience with a focus in the areas of estate planning, tax planning, high-net-worth planning, business succession planning, charitable giving, special needs planning, and trust and estate administration.

Most of Nic's practice is centered around efficient tax planning strategies for individuals, families and family owned businesses. Specifically, Nic has successfully navigated complex qualified fund planning allocations for clients after the limitation of lifetime stretch IRAs post the 2020 Secure Act through the utilization of charitable planning. He has also successfully assisted numerous family businesses through strategic tax generational lifetime transfers. Nic advises clients in regard to inter vivos and testamentary planning techniques with a special focus on generation skipping transfer tax planning, timed defective trust funding, complex and rolling grantor retained annuity trust plans, and beneficiary deemed owner trust toggle provisions based on a balance of estate, gift and income tax scenarios.

Nic also safeguards the privacy of athletes, business owners, media personalities, and other high profile clients by employing blind trust ownership strategies.

Known for his dedication to pro bono work, Nic received the Ohio Northern Pro Bono Service Recognition Award in 2011. He also received the Volunteer Attorney of the Year for the 18th Judicial District of Arkansas in 2013 and the Legal Aid of Arkansas Pro Bono Service Award in 2017.

## BAR ADMISSIONS

- Pennsylvania
- Arkansas
- U.S. Tax Court

## PRESENTATIONS

- "From simple to complex: Planning across the client spectrum," The Community Foundation of Westmoreland County, March 10, 2025

## CONTACT

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## EDUCATION

Villanova University Charles Widger School of Law, LL.M., 2021

Ohio Northern University College of Law, J.D., 2011

Duquesne University, B.M., 2009

## SERVICES

### Tax, Estate Planning & Personal Wealth

- Estate and gift planning
- Wealth and asset preservation
- Tax
- Family office
- Marital agreements, adoptions and guardianships

### Mergers & Acquisitions

- Family office

### Business Growth & Operation

- Family office

### Sports

- “Never Too Early! Must-Have Estate Planning Priorities for Business Owners,” Exit Planning Institute – Pittsburgh Chapter, February 20, 2025
- “Panel Discussion of Estate Planning’s Critical Role for Business Owners,” Exit Planning Institute - Pittsburgh Chapter, October 17, 2024
- “ESOP Ownership Trusts,” Ohio Employee Ownership Center, June 19, 2024
- “Proposed Legislation Could Affect Planned Giving Strategies,” The Pittsburgh Foundation, May 14, 2024
- “The Donor with Diminished Capacity,” The Pittsburgh Foundation, February 13, 2023
- “The Nuts & Bolts of Pennsylvania Inheritance Tax,” PICPA Foundation, August 2019
- “Guardianships and Special Needs Planning,” Engage Conference, February 2017
- “Guardianships and Incapacity Planning,” SALT Conference, June 2016
- “Understanding Capacity and the World of Elder Law,” Health Care Marketing Alliance Conference, April 2016
- “Arkansas Guardianships,” Arkansas Trial Lawyers Association, June 2015

## PROFESSIONAL ASSOCIATIONS

- American Bar Association
- Pennsylvania Bar Association
- Allegheny County Bar Association

## HONORS | AWARDS

- *Best Lawyers: Ones to Watch in America*®
- Pennsylvania Super Lawyers, Rising Stars Edition
- Legal Aid of Arkansas, Pro Bono Service Award, 2017
- 18th Judicial District of Arkansas, Volunteer Attorney of the Year, 2013
- Ohio Northern Pro Bono Service Recognition Award, 2011

## COMMUNITY

- The Pittsburgh Foundation, Young Professional Advisors Committee, Member
- Pittsburgh Airport Area Chamber of Commerce, Former Board Member
- Westmoreland Arts & Heritage Festival, Former Board Member