

Peter E. Moshang

Partner

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PRACTICE AREAS

- Estate and Tax Planning
- Estate and Trust Planning
- Estate and Gift Taxation

EDUCATION

Boston University School of Law,
cum laude (2013)

University of Richmond, B.A.,
summa cum laude, Phi Beta Kappa
(2010)

ADMISSIONS

Pennsylvania (2013)

New Jersey (2013)

Florida (2018)

BIOGRAPHY

Peter Moshang focuses his practice on estate planning, trust and estate administration, and estate and gift taxation.

Peter received his B.A. in Political Science (with departmental honors) and Economics, *summa cum laude*, Phi Beta Kappa, from the University of Richmond in 2010. He then received his J.D., cum laude, from Boston University School of Law in 2013, where he was the Editor-in-Chief of the American Journal of Law & Medicine. During law school, Peter served as a summer law clerk to President Judge Susan Peikes Gantman in the Pennsylvania Superior Court.

Peter currently serves on the Executive Committee of the Philadelphia Bar's Probate and Trust Law Section and serves as Vice Chair of the IRA Plans & Distributions Committee for the American Bar Association Real Property Trusts & Estate Section.

Peter was named a Rising Star *Super Lawyer by Thomson Reuters* in trust and estate law from 2019 to 2022. In addition, Peter was named a "*Best Lawyers: Ones to Watch in America* (2023)". Peter also was nominated for and is participating in the Mid-Atlantic Fellows Institute, Class IV, sponsored by the American College of Trust and Estate Counsel (ACTEC).

MEMBERSHIPS

- Philadelphia Bar Association
 - Probate and Trust Law Section – Executive Committee Member (2023 – Present)
- American Bar Association
 - Real Property, Trust and Estate Law Division
 - Vice-Chair of the IRAs and Plan Distributions Committee (2024 – Present)
 - Young Lawyers Division
- Philadelphia Estate Planning Council
- Pennsylvania Bar Association
 - Real Property, Probate & Trust Law Section
- Montgomery County Estate Planning Council
- New Jersey Bar Association
- Florida Bar Association
 - Out of State Division
 - Real Property, Probate & Trust Section
 - Young Lawyers Section

HONORS/AWARDS

- Pennsylvania Super Lawyer Rising Star (2020 – 2023)
- The Best Lawyers in America: Ones to Watch (2023)

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SPEAKING ENGAGEMENTS

- **2025** Co-Speaker/Co-Author Post-Election Planning for the (Family) Board Room: Strategic Tax, Financial and Estate Planning in Proactive Exit Planning for Closely-Held Business Owners, Montgomery County Estate Planning Council (March 2025)
- **2025** Speaker/Author, Are Your Trusts Still SECURE? Understanding the Impact of the SECURE Act and Final Regulations, Pennsylvania Bar Institute Estate and Elder Law Symposium (Feb. 2025).
- **2024** Co-Speaker/Author, Finally Final: What You Need to Know About the Final Regulations for the SECURE Act (and the Proposed Regulations for SECURE 2.0), Pennsylvania Bar Institute (Dec. 2024).
- **2024** Co-Speaker/Co-Author, Now Trending: SLATs, Pennsylvania Bar Institute, 31st Annual Estate Law Institute (Dec. 2024).
- **2024** Speaker/Author, Are Trusts SECURE? Estate Planning With Retirement Assets and Trusts Following The SECURE Acts, Pennsylvania Bar Institute, 31st Annual Estate Law Institute (Dec. 2024).
- **2024** Co-Speaker/Co-Author, Tales from the (Family) Board Room: Strategic Tax, Financial and Estate Planning in Proactive Exit Planning for Closely-Held Business Owners, The Estate and Financial Planning Council of Southern New Jersey (Sept. 2024).
- **2024** Speaker/Author, Is Your Planning SECURE? Estate Planning With Retirement Assets Following The SECURE Act 1.0 and 2.0, Pennsylvania Bar Institute Estate and Elder Law Symposium (Feb. 2024).
- **2023** Speaker/Author, Is Your Planning SECURE? Estate Planning With Retirement Assets Following The SECURE Act 1.0 and 2.0, Pennsylvania Bar Institute, 30th Annual Estate Law Institute (Nov. 2023).
- **2023** Co-Speaker/Author, SECURE Act 1.0 and 2.0: What Estate Planners Need to Know, Chester County Estate Planning Council (Oct. 2023).
- **2023** Speaker, Estate Planning With Retirement Assets After SECURE Act 2.0, Pennsylvania Bar Association – Elder Law Section (May 2023)
- **2023** Speaker/Author, Is Your Planning SECURE? What You Need to Know About Estate Planning With Retirement Assets Following The SECURE Act 1.0 and 2.0, Montgomery County Estate Planning Council (Mar. 2023).
- **2023** Co-Speaker/Co-Author, SECURE Act Updates: Are Our Retirement Plans Finally Secure? And Where Do We Go From Here?, March 2023 Probate & Trust Law Section Quarterly Meeting of the Philadelphia Bar Association (Mar. 2023).
- **2022** Speaker, Hot Topics in Estate Planning, FPA of the Philadelphia Tri-State Area March 2022 Meeting (Mar. 2022).
- **2020** Speaker/Author, Income Tax Basis Planning: Modifying Existing Trusts, Pennsylvania Bar Institute, 27th Estate Law Institute (Nov. 2020).

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- **2020** Co-Speaker/Co-Author, The SECURE Act – What You Need to Know, Pennsylvania Bar Institute (Feb. 2020).
- **2020** Co-Speaker/Co-Author, *Estate Planning for Retirement Assets Following the SECURE Act*, Pennsylvania Bar Institute Estate and Elder Law Symposium (Feb. 2020).
- **2020** Speaker/Co-Author, Estate Planning for Retirement Assets Following the SECURE Act, Philadelphia Bar Probate Section Tax Committee (Feb. 2020).
- **2019** Co-Speaker/Co-Author, Administering An Estate With Retirement Assets, Pennsylvania Bar Institute, 26th Estate Law Institute (Nov. 2019).
- **2018** Co-Speaker, Federal Estate, Gift and GST Taxes, Pennsylvania Bar Institute, 25th Estate Law Institute (Nov. 2018).

PUBLICATIONS

- **2024** Author, IRS Issues Final Regulations for SECURE Act 1.0 (and Proposed Regulations for SECURE Act 2.0), Philadelphia Bar Association – Probate and Trust Law Section Newsletter (Dec. 2024)
- **2024** Author, Step It Up! Achieving Basis Adjustments for Certain Trust Assets Using Formula General Powers of Appointment, Estate Planning Journal (Dec. 2024)
- **2024** Co-Author, How – and How Not – To Use Life Insurance in Your Family Business, Family Business Magazine (June 2024)
- **2024** Author, IRS Changes Its Mind on Modifications of Grantor Trusts to Add Tax Reimbursement Clause, Philadelphia Bar Association – Probate and Trust Law Section Newsletter (Mar. 2024)
- **2023** Author, SECURE Act 2.0 Includes Additional Changes for Estate Planning Clients, Philadelphia Bar Association – Probate and Trust Law Section Newsletter (May 2023)
- **2022** Co-Author, The SECURE Act Proposed Regulations Provide Clarifications and Unexpected Developments for Estate Planning Clients, Philadelphia Bar Association – Probate and Trust Law Section Newsletter (Aug. 2022)
- **2021** Co-Author, Florida's New Community Property Act Creates Planning Opportunities and Risks for Married Couples, Philadelphia Bar Association – Probate and Trust Law Section Newsletter (Nov. 2021)
- **2016** Co-Author, Administering an Estate with Retirement Assets, Pennsylvania Bar Institute, 23rd Estate Law Institute (Nov. 2016)
- **2014** Author, What is "Reasonable"? Analyzing Fiduciary Compensation in Pennsylvania, Delaware and New Jersey, Philadelphia Bar Association, Probate and Trust Law Section Newsletter (May 2014)