

**SUSAN R. SCHOENFELD, MBA, JD, LL.M. (TAXATION), CPA**  
**BESSEMER TRUST**

Susan R. Schoenfeld is an Attorney and CPA, practicing in the area of estate planning. Susan is Principal and Associate Fiduciary Counsel in the Legacy Planning Department of Bessemer Trust, where she helps high net worth individuals and families develop and implement generational wealth transfer planning strategies.

Susan is a member of the American Bar Association, New York State Bar Association (Estate Planning Committee 2003-), Association of the Bar of the City of New York (Estate and Gift Taxation Committee 2000-2003), and the Westchester County Bar Association.

She regularly speaks on estate planning matters, including recent presentations at Practising Law Institute, New York University Summer Institute in Taxation, and the Westchester County Bar Association. She has chaired the Foundation for Accounting Education's Estate Planning Conference and its Annual Tax Conference numerous times.

Susan was extensively quoted in the Financial Times, March 25, 2008, *Parents Must Put Children In The Know*, By Ian Driscoll. She has authored numerous tax and estate planning articles published in professional journals, and wrote the Estate Planning column for Small Business Taxation magazine. Her other publications include *Allocation of GST Exemption to Contributions to Life Insurance Trusts*, CPA Journal, May 1999; *Can Your Pet Be Trusted?*, CPA Journal, July 1997; *Post Mortem Estate Planning*, Small Business Taxation, May 1989; reprinted in WG&L Tax News, Fall 1989; and *Rehabilitation Credit*, CPA Journal, May 1986.

She serves on the Estate Planning Committee (Committee Chair 2000-2002) of the New York State Society of Certified Public Accountants, also serves on its Tax Division Oversight Committee (Committee Chair 2006-2008), and previously served as the Society's Vice-President (2005-2006) and on its Strategic Planning Task Force, Committee on Committee Operations and Awards Committee. Susan chaired the Estate Planning Committee of the Westchester Chapter of the NYS Society of CPAs; subsequently, she served as Chapter Officer and Executive Board member, and is past-President of that Chapter.

In addition to her CPA, Susan was awarded an LL.M. (in Taxation) from NYU School of Law, a J.D. from Pace University School of Law, and BBA (*summa cum laude*) and MBA (with distinction) degrees in Accounting from Pace University.

Susan is volunteer Treasurer for the Broadway Training Center of Westchester, a not-for-profit performing arts training center located in Hastings-on-Hudson, NY.