



## Cressida A. Dixon

### Member

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### Profile

**Cressida counsels high-net-worth individuals and family groups in sophisticated wealth and estate planning; estate, gift and generation-skipping transfer taxation; income taxation of estates and trusts; and succession planning for closely held and family businesses.**

Her clients range from successful entrepreneurs and corporate executives to multigenerational families and their entities. Cressida works closely with clients at every stage of wealth planning to implement tax efficient wealth transfer and preservation strategies that are customized in order to achieve their business, personal and philanthropic goals.

Cressida's practice in wealth and estate planning includes:

- Structuring and implementing lifetime and testamentary transfers of wealth
- Creating and funding grantor retained annuity trusts, including gifts of stock in a publicly traded company to GRATs in anticipation of a potential sale
- Representing individual and corporate executors of estates from \$5 million to \$200 million in connection with the estate administration, including preparation of federal and state estate and fiduciary income tax returns
- Planning for succession of closely held and family-business owners, including addressing family relationship issues that affect both current and long-range aspects of the business operation and family bonds
- Preparing and implementing prenuptial and postnuptial agreements to minimize controversies that can arise in dissolution proceedings, particularly when a family business is involved
- Structuring and implementing gifts to charitable trusts, private foundations and other charitable entities
- Representing colleges and universities in their capacity as beneficiaries of estates and trusts
- Preparing and analyzing wills, trusts, powers of attorney and advance directives for health care, shareholder and operating agreements, and other ancillary estate planning documents

Cressida also represents individual and corporate fiduciaries and beneficiaries of trusts and estates regarding all aspects of administration, the review and preparation of estate and generation-skipping transfer tax returns, the analysis of

### Education

- Syracuse University College of Law (J.D., *magna cum laude*, 1996)
- State University of New York at Albany (B.S., *magna cum laude*, 1992)

### Bar/Court Admissions

- New York
- U.S. District Court for the Western District of New York

### Practices

- Higher Education
- Trust and Estate

fiduciary income tax matters, and trust construction and reformation suits and other contested trust and estate matters.

In addition to her active practice, Cressida is widely viewed as a leader in her field and consistently is recognized by peers as a top lawyer in *Best Lawyers in America* and *New York Super Lawyers*.

## Honors & Affiliations

- Listed in:
  - *The Best Lawyers in America*®, Trusts and Estates, 2013-2024 (listed for more than 10 years)
    - Lawyer of the Year (Rochester), Trusts and Estates, 2021, 2023
  - *New York Super Lawyers*®, Estate and Probate, 2023
  - *Martindale-Hubbell*®, AV Preeminent Rated
  - *Daily Record*, Power 50, 2021
- The Fellows of the New York Bar Foundation
- New York State Bar Association, Trusts and Estates Section
- Monroe County Bar Association, Trusts and Estates Section
- Monroe County Public Administrator
- Estate Planning Council of Rochester, New York
- Order of the Coif

## Representative Presentations

- An Interview with Cressida Dixon, Trust and Estate, Legally Bond Podcast, March 29, 2021
- Careers in Estates and Trusts, Wealth Management and Financial Planning, Alumni Panel Discussion, Syracuse University Law Career Services, February 18, 2021
- Panelist, Business Owner's Journey: Lessons Learned Before, During and After the Sale of a Business, November 14, 2019

## Representative Publications

- "First Female Public Administrator Hits the Ground Running," *Rochester Beacon*, March 8, 2021
- "Cressida Dixon: Tending to Monroe County's Dead When No One Else Will," *Rochester CITY News*, March 1, 2021
- "It Takes a Team to Make Sure Your Estate is Ready for All Eventualities," *Rochester Business Journal*, January 2, 2020

## Other Activities

- Greater Rochester Association of Women Attorneys, *Rochester Business Journal*, 2006 Forty Under 40
- Graduate, 2006 Leadership Rochester
- Member, Syracuse University Professional Advisors Network

- Member, University of Rochester Medical Center Planned Giving Committee
- Member, Women's Executive Network
- Member, \$1 Million Dollar Women's Education Club
- Past Member, Board of Directors, Rochester Childfirst Network