

IRA MARK BLOOM

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PERSONAL DATA: Born: November 10, 1944; Married; Two children

EDUCATION: B.B.A., City College of New York – 1966

J.D., Syracuse University College of Law – 1969
Research Editor, Syracuse Law Review; Order of
the Coif; Magna Cum Laude

LEGAL EXPERIENCE: Trial and Appellate Attorney – 1969-1974
U.S. Department of Justice Honor's Program, Tax
Division, Court of Claims Section, Washington,
D.C.

BAR MEMBERSHIPS: New York, California, US Supreme Court

TEACHING EXPERIENCE: Justice David Josiah Brewer
Distinguished Professor of Law – 2002-Present
Albany Law School
Albany, New York

Professor of Law – 1981-2002
Albany Law School
Albany, New York

Associate Professor of Law – 1979-1981
Albany Law School
Albany, New York

Associate Professor of Law – 1977-1979
Loyola University School of Law
New Orleans, Louisiana

Assistant Professor of Law – 1974-1977
Loyola University School of Law
New Orleans, Louisiana

Ira Mark Bloom

Visiting Professor – 1996-1997
McGeorge School of Law
Sacramento, California

Drinko-Baker & Hostetler Visiting
Professor of Law – 1989-1990
Ohio State University College of Law,
Columbus, Ohio

Visiting Professor – Fall 1984
McGeorge School of Law
Sacramento, California

Visiting Professor – Fall 1978
Albany Law School
Albany, New York

Visiting Professor – Spring 1976
Tulane Law School
New Orleans, Louisiana

COURSES TAUGHT: Estate Planning, Federal Estate and Gift Taxation,
Federal Income Taxation, Future Interests,
Property, Trusts and Estates, Wealth Transmission
Process

COMMITTEE SERVICE: Academic Standards, Budget, Computer,
Curriculum, Enrichment, and Faculty Affairs

AWARDS: Albany Law School's Excellence in Service
Award, 2009

Loyola Student Bar Association's
Best Professor Award, 1975-1976 and 1978-1979

ADVISOR: Tax Moot Court Team of Albany Law School,
1980-1989

Voluntary Income Tax Assistance
(VITA) Program 1980-1995

PUBLICATIONS:

Casebooks:

FUNDAMENTALS OF TRUSTS AND ESTATES (5th edition) (with Andersen) (Carolina Academic Press) (Summer, 2017)

FEDERAL TAXATION OF ESTATES, TRUSTS AND GIFTS (4th edition) (Bloom as lead author, with Joyce) (LexisNexis) (Spring 2014)

FUNDAMENTALS OF TRUSTS AND ESTATES (4th edition) (with Andersen) (LexisNexis) (Spring, 2012)

FUNDAMENTALS OF TRUSTS AND ESTATES (3d edition) (with Andersen) (LexisNexis) (Spring, 2007)

REVISED FEDERAL TAXATION OF ESTATES, TRUSTS AND GIFTS (3d edition) (Bloom as lead author, with Boyle, Gaubatz and Solomon) (LexisNexis) (2003)

FEDERAL TAXATION OF ESTATES, TRUSTS AND GIFTS (3d edition) (Bloom as lead author, with Boyle, Gaubatz and Solomon) (LexisNexis) (2002)

FUNDAMENTALS OF TRUSTS AND ESTATES (2d edition) (with Andersen) (LexisNexis) (2002)

FEDERAL TAXATION OF ESTATES, TRUSTS AND GIFTS (2d edition) (Bloom as lead author, with Boyle, Gaubatz & Solomon) (Matthew Bender, 1998)

ESSENTIALS OF TRUSTS AND ESTATES (With Andersen, Gaubatz and Solomon) (Matthew Bender 1996)

ESTATES AND TRUSTS: CASES, PROBLEMS
AND MATERIALS (with Gaubatz and Solomon)
(Matthew Bender 1989)

FEDERAL TAXATION OF ESTATES, TRUSTS
AND GIFTS (with Gaubatz and Solomon)
(Matthew Bender 1989)

ESTATES, TRUSTS AND TAXES – CASES
AND MATERIALS ON THE WEALTH
TRANSMISSION PROCESS (with Gaubatz)
(Matthew Bender 1983)

Supplements:

FEDERAL TAXATION OF ESTATES, TRUSTS,
AND GIFTS (Carolina Academic Press 2016)

FUNDAMENTALS OF TRUSTS AND
ESTATES (Carolina Academic Press 2016)

FEDERAL TAXATION OF ESTATES, TRUSTS,
AND GIFTS (Carolina Academic Press 2016)

FUNDAMENTALS OF TRUSTS AND
ESTATES (LexisNexis 2015)

FEDERAL TAXATION OF ESTATES, TRUSTS
AND GIFTS (LexisNexis 2015)

FEDERAL TAXATION OF ESTATES, TRUSTS
AND GIFTS (LexisNexis 2014)

FUNDAMENTALS OF TRUSTS AND
ESTATES (LexisNexis 2014)

FEDERAL TAXATION OF ESTATES, TRUSTS
AND GIFTS (LexisNexis 2013)

FEDERAL TAXATION OF ESTATES, TRUSTS
AND GIFTS (LexisNexis 2012)

FEDERAL TAXATION OF ESTATES, TRUSTS
AND GIFTS (LexisNexis 2011)

FEDERAL TAXATION OF ESTATES, TRUSTS
AND GIFTS (with Gaubatz and Solomon)
(Matthew Bender 1993)

FEDERAL TAXATION OF ESTATES, TRUSTS
AND GIFTS (with Gaubatz and Solomon)
(Matthew Bender 1992)

Teacher's Manuals:

Teacher's Guide for FUNDAMENTALS OF
TRUSTS AND ESTATES (5th edition) (with
Andersen) (Carolina Academic Press) (Summer
2017)

Teacher's Guide for FEDERAL TAXATION OF
ESTATES, TRUSTS AND GIFTS (4th edition)
(with Joyce) (Lexis Publishing) (Publication Date:
Spring, 2014)

Teacher's Guide for FUNDAMENTALS OF
TRUSTS AND ESTATES (4th edition) (with
Andersen) (Lexis Publishing) (Spring 2012)

Teacher's Guide for FUNDAMENTALS OF
TRUSTS AND ESTATES (3d edition) (with
Andersen) (Lexis Publishing) (Spring 2007)

Teacher's Guide for REVISED FEDERAL
TAXATION OF ESTATES, TRUSTS AND
GIFTS (3d edition) (with Boyle, Gaubatz and
Solomon) (Lexis Publishing) (2003)

Teacher's Guide for FUNDAMENTALS OF
TRUSTS AND ESTATES (2d edition) (with
Andersen) (Lexis Publishing) (2002)

Ira Mark Bloom

Teacher's Guide for FEDERAL TAXATION OF ESTATES, TRUSTS AND GIFTS (2d edition) (with Boyle, Gaubatz and Solomon) (Matthew Bender 1999)

Teacher's Manual for ESTATES AND TRUSTS: CASES, PROBLEMS AND MATERIALS (with Gaubatz and Solomon) (Matthew Bender 1989)

Teacher's Manual for FEDERAL TAXATION OF ESTATES, TRUSTS AND GIFTS (with Gaubatz and Solomon) (Matthew Bender 1989)

Teacher's Manual ESTATES, TRUSTS AND TAXES – CASES AND MATERIALS ON THE WEALTH TRANSMISSION PROCESS (with Gaubatz) (Matthew Bender 1984)

Treatises:

Ira Mark Bloom and William P. LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (2 volumes) (4th ed., 2010, LexisNexis Matthew Bender) (Specific chapters written listed under *Chapters*)

Harold D. Klipstein and Ira Mark Bloom, DRAFTING NEW YORK WILLS (Bloom as principal author) (2 volumes) (3rd ed., LexisNexis Matthew Bender) (Specific chapters written listed under *Chapters*)

Articles:

Power of Appointment Legislation in New York: It's Time for Modernization, 76 ALBANY LAW REVIEW 9-86 (2013)

Unifying the Rules for Wills and Revocable Trusts in the Federal Estate Tax Apportionment Arena: Suggestions for Reform, 62 UNIV of MIAMI LAW REVIEW 767-810 (2008), reprinted in its entirety in 43 REAL PROPERTY, TRUSTS AND ESTATES LAW JOURNAL, 447-497 (2008).

Powers of Appointment under the Restatement (Third) of Property, 33 OHIO NORTHERN UNIV LAW REVIEW 755-805 (2007)

Lifetime Transfers Can Reduce New York Estate Taxes, 38 TRUSTS AND ESTATES LAW NEWSLETTER 13-21 (2005)

Federal Transfer Taxes Affect the Development of Property Law, 48 CLEVELAND STATE LAW REVIEW 661-676 (2000) (Published in April 2002)

The GST Tax Tail is Killing the Rule against Perpetuities, 87 TAX NOTES 569-576 (2000)

The Treatment of Trust and Other Partial Interests of the Surviving Spouse under the Redesigned Elective-Share System: Some Concerns and Suggestions, 55 ALBANY LAW REVIEW 941-982 (1992)

Perpetuities Reformers Beware: The USRAP Tax Trap, 25 REAL PROPERTY, PROBATE AND TRUST JOURNAL 203-211 (1990) (with Professor Jesse Dukeminier)

Federal Generation-Skipping Taxation: How Should The States Respond? 51 ALBANY LAW REVIEW 817-894 (1987)

Perpetuities Refinement: There Is an Alternative, 62 WASHINGTON LAW REVIEW 23-79 (1987)

Transfer Tax Avoidance: The Impact of Perpetuities Restrictions before and after Generation-Skipping Taxation, 45 ALBANY LAW REVIEW 261-310 (1981)

Ira Mark Bloom

The Generation-Skipping Loophole: Narrowed, but Not Closed, by the Tax Reform Act of 1976, 53 WASHINGTON LAW REVIEW 31-104 (1977)

Fifth Circuit Symposium: Federal Taxation, 22 LOYOLA LAW REVIEW 435-461 (1976)

Dedication: *Dedication to Professor Samuel M. Fetters*, 42 Syracuse Law Review 1019-1022 (1992)

Chapters: Revised Chapter 15: “Charitable Dispositions” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2016) (222 pages)

Revisions to Chapter 18: “Marital Deduction” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2015) (90 pages)

Revised Chapter 18: “Revocable Trusts” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender 2015) (150 pages)

Revisions to Chapter 14: “Marital Deduction” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2014) (185 pages)

Revised Chapter 16: “Generation-Skipping Transfer Taxation” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2013) (167 pages)

Chapter 22: “Public Sector Benefits under Social Security” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2013) (25pages)

Revised Chapter 14: “Marital Deduction” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender 2013) (350 pages)

Revised Chapter 20: “Advanced Written Directives for Health Care” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2012) (197 pages)

Revised Chapter 9: Powers of Appointment” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2012) (54 pages)

Revised Chapter 16: “Generation-Skipping Transfer Taxation” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2011) (167 pages)

Revised Chapter 14: “Marital Deduction” in Bloom and LaPiana, DRAFTING NEW YORK WILLS AND RELATED DOCUMENTS (LexisNexis Matthew Bender, 2011) (304 pages)

Revised Chapter 17: Advance Written Directives for Property and Health Care (co-authored) in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2009) (269 pages)

Revised Chapter 19: “Revocable Trusts” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2008) (136 pages)

Revised Chapter 2: “Execution and Revocation of Wills” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2008) (42 pages)

Revised Chapter 11: “Testamentary Trusts” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2008) (156 pages)

Revised Chapter 12: “Life Estates and Remainders” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2008) (57 pages)

Revised Chapter 20: “Generation-Skipping Transfer Taxation” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2007) (161 pages)

Revised Chapter 9: “Charitable Dispositions” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2007) (215 pages)

Revised Chapter 7: “Marital Deduction” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2006) (345 pages)

Revised Chapter 2: “Execution and Revocation of Wills” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2005) (42 pages)

Revised Chapter 11: “Testamentary Trusts” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2005) (174 pages)

Revised Chapter 17: Advance Written Directives for Property and Health Care (co-authored) in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2005) (250 pages)

Revised Chapter 9: “Charitable Dispositions” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2004) (166 pages)

Revised Chapter 7: “Marital Deduction” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2004) (312 pages)

Revised Chapter 19: “Revocable Trusts” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2003) (142 pages)

Revised Chapter 18: “Retirement and Estate Planning” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2003) (115 pages)

Chapter 20: “Generation-Skipping Transfer Taxation” in Klipstein and Bloom (LexisNexis Matthew Bender, 2002) (172 pages)

Chapter 7: “Marital Deduction” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (LexisNexis Matthew Bender, 2002) (317 pages)

Chapter 18: “Retirement and Estate Planning” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (Matthew Bender, 2001) (98 pages)

Chapter 15: “Fiduciary Powers” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (Matthew Bender, 2001) (118 pages)

Chapter 12: “Legal Life Estates and Remainders” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (Matthew Bender, 2001) (61 pages)

Chapter 11: “Dispositive Provisions in Testamentary Trusts” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (Matthew Bender, 2000) (159 pages)

Chapter 19: “Revocable Trusts” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (Matthew Bender, 1998) (125 pages)

Revised Chapter 9: “The Marital Deduction” in MURPHY'S WILL CLAUSES (Matthew Bender, 1995) (234 pages)

Revised Chapter 3B: “Federal Income Taxation: Will Drafting and Planning Considerations” in MURPHY'S WILL CLAUSES (Matthew Bender, 1994) (185 pages)

Chapter 3C: “Federal Income Taxation of Trusts: Drafting and Planning Considerations” in MURPHY'S WILL CLAUSES (Matthew Bender, 1994) (194 pages)

Chapter 3D: “Federal Income Taxation of Grantor Trusts: Drafting and Planning Considerations” in MURPHY'S WILL CLAUSES (Matthew Bender, 1994) (70 pages)

Chapter 41A: “Federal Income Taxation of Lifetime Trusts” in POWELL ON REAL PROPERTY (Matthew Bender, 1993) (206 pages)

Chapter 41B: “Federal Income Taxation of Testamentary Trusts” in POWELL ON REAL PROPERTY (Matthew Bender, 1993) (120 pages)

Chapter 41C: “Federal Gift and Estate Taxation of Trusts” in POWELL ON REAL PROPERTY (Matthew Bender, 1993) (102 pages)

Chapter 41D: “Federal Taxation of Generation-Skipping Trusts” in POWELL ON REAL PROPERTY (Matthew Bender, 1993) (92 pages)

Chapter 9: “Rights of Surviving Spouse” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (Matthew Bender, 1993) (189 pages)

Revision of Chapter 9A: “Limitations on the Freedom of Testation: Spousal Protection” in MURPHY'S WILL CLAUSES (Matthew Bender, 1993) (272 pages)

Chapter 3D: “Federal Income Taxation of Lifetime Trusts: Will Drafting and Planning Considerations” in MURPHY'S WILL CLAUSES (Matthew Bender, 1992) (268 pages)

Chapter 17: “Advance Written Directives for Property and Health Care” in Klipstein and Bloom, DRAFTING NEW YORK WILLS (Matthew Bender, 1992) (250 pages)

Chapter 2: “Present Possessory Estates” in THE AMERICAN LAW OF REAL PROPERTY (Matthew Bender, 1991) (31 pages)

Chapter 3: “Future Possessory Estates” in **THE AMERICAN LAW OF REAL PROPERTY** (Matthew Bender, 1991) (79 pages)

Chapter 11A: “Generation-Skipping Transfer Taxation” in **KLIPSTEIN'S DRAFTING NEW YORK WILLS** (Matthew Bender, 1991) (184 pages)

Chapter 3C: “Federal Income Taxation of Testamentary Trusts: Will Drafting and Planning Considerations” in **MURPHY'S WILL CLAUSES** (Matthew Bender, 1991)

Chapter 7: “Marital Deduction” in **KLIPSTEIN'S DRAFTING NEW YORK WILLS** (Matthew Bender, 1990) (269 pages)

Revised Chapter 3A: “Federal Generation-Skipping Transfer Taxation: Will Drafting and Planning Considerations” in **MURPHY'S WILL CLAUSES** (Matthew Bender, 1989) (176 pages), with revisions

Chapter 3B: “Federal Income Taxation: Will Drafting and Planning Considerations” in **MURPHY'S WILL CLAUSES** (Matthew Bender, 1988) (197 pages), with revisions

Chapter 3A: “Federal Generation-Skipping Transfer Taxation: Will Drafting and Planning Considerations” in **MURPHY'S WILL CLAUSES** (Matthew Bender, 1987) (165 pages)

Chapter 3: “Federal Estate and Gift Taxation: Will Drafting and Planning Considerations” in **MURPHY'S WILL CLAUSES** (Matthew Bender, 1986) (222 pages), with revisions

Chapter 9: “The Marital Deduction” in MURPHY'S WILL CLAUSES (Matthew Bender, 1985) (272 pages), with revisions

Chapter 9A: “Limitations on the Freedom of Testation: Spousal Protection” in MURPHY'S WILL CLAUSES (Matthew Bender, 1984) (271 pages)

Pamphlet:

NEW POWER OF ATTORNEY LEGISLATION FOR NEW YORK (co-authored) (LexisNexis 2009) (185 pages)

REVISIONS TO NEW YORK'S TRUSTS AND ESTATES LAW (Matthew Bender 1992)

Explanations:

Explanation and Analysis of Estate Tax Laws of District of Columbia, Illinois, Louisiana, Michigan, Maryland and Texas (Research Institute of America 1994)

Reports:

COMMNETARTY AND RECOMMENDATIONS TO NEW YORK STATE LEGISLATIVE ON THE SIXTH REPORT OF THE EPTL-SCPA LEGISLATIVE ADVISORY COMMITTEE (co-authored), submitted to the Executive Committee of the Trusts and Estates Law Section, NYSBA (Feb. 2017) (340 pages) at www.nysba.org/LegislativeReportFebruary2017

FINALREPORT ON THE EPTL-SCPA LEGISLATIVE ADVISORY COMMITTEE'S SIXTH REPORT (co-authored), submitted to the Executive Committee of the Trusts and Estates Law Section, NYSBA (Jan. 2016) (330 pages) at www.nysba.org/FinalReport2016

INTERIM REPORT ON THE EPTL-SCPA LEGISLATIVE ADVISORY COMMITTEE'S SIXTH REPORT (co-authored), submitted to the Executive Committee of the Trusts and Estates Law Section, NYSBA (Jan. 2015) (280 pages) at www.nysba.org/TEInterimReportLatest

PROFESSIONAL ACTIVITIES:

- Academic Fellow:* American College of Trust and Estate Counsel, elected in 1993
- *Member, Estate and Gift Tax Committee, 1997-March 2008; March 2011-2014
 - *Member, Legal Education Committee, 1998-Present
 - Principal Responsibility for Creation of Law Student Writing Competition, 2003
 - Coordinator of Student Writing Competition, 2007-2012
 - *Member, State Laws Committee, 1998-Present
 - Principal Responsibility for Creation of National Survey on Revocable Trusts, 2006
- Fellow:* New York State Bar Foundation Fellow, elected in 2000
- Membership:* American Law Institute, elected in 1993
- *Member of Consultative Group for Restatement (Third) of the Law of Trusts
 - *Member of Consultative Group for Restatement (Third) of the Law of Property (Wills and Other Donative Transfers)
- Association of American Law Schools:* Chair, Section on Donative Transfers, Fiduciaries and Estate Planning, 1988-1989

Ira Mark Bloom

Executive Committee, Section on Donative
Transfers, Fiduciaries and Estate Planning,
1989-1990

*NYUTC - Legislative
Action Group:*

Member, Steering Committee, 2012-

*Trusts and Estates Law
Section of New York
State Bar Association:*

Chair, NYUTC Committee, 2012-
Officers' Committee Member, 2010-2012
Liaison to EPTL-SCPA Legislative Advisory
Committee, 2009-Present
Section Chair, 2009
Chair-Elect, 2008
Secretary, 2007
Treasurer, 2006
Vice-Chair, Taxation Committee, 2004-2006
Program Chair, 2001 Fall Meeting
Chair, Multi-State Practice Committee, 1998-2001
Vice-Chair, Multi-State Practice Committee, 1998-
2000
Vice-Chair, Taxation Committee, 1996-1998
Chair, Winter 1994 Program on Generation-
Skipping Transfer Taxation
Chair, Taxation Committee, 1992-1995
Vice-Chair, Taxation Committee, 1989-1992
Program Co-Chair, Fall 1990 Program on
Conducting Federal Estate Tax Audits

*Trusts and Estates and
Surrogate's Court
Committee of Bar of
The City of New York:*

Member, 2008-2011, 2014-2017

*Estate and Gift Tax
Committee of Bar of
The City of New York:*

Member, 2011-2014, 2017-

Consultantships: Consultant on Transfer Taxation, Legislative Tax Study Commission of New York, 1982-1983

Consultant to EPTL-SCPA Legislative Advisory Committee, New York State, 1991-1993

PAPERS:

TOWARDS A MODERN TRUST CODE FOR NEW YORK: REVOCABLE TRUSTS PROVISIONS IN THE INTERIM REPORT (co-authored) in 137th Annual Meeting Program Book, New York State Bar Association, Trusts and Estates Law Section (Jan. 2015) (22 pages)

The Uniform Powers of Appointment Act in Eleventh Annual Sophisticated Trusts and Estates Law Institute (NYSBA) (Nov. 2013) (47 pages)

Towards a Modern Trust Code for New York: A Work in Progress in 67th Trust and Investment Conference of New York Bankers Association (Oct. 2013) (142 pages)

Powers of Appointment under the Restatement (Third) of Property in Thirty First Southern California Tax & Estate Forum (Oct. 2011) (43 pages)

The Revocable Trust Device: A Matter of Life and Death at Symposium on the Law of Succession in the 21st Century, UCLA School of Law (Feb. 2009) (35 pages)

Powers of Appointment in Sixth Annual Sophisticated Trusts and Estates Law Institute (NYSBA) (Nov. 2008) (29 pages)

Ira Mark Bloom

Planning Considerations for the New York Estate Tax in Third Annual Sophisticated Trusts and Estates Law Institute (NYSBA) (Nov.2005) (31 pages)

Trust Drafting Considerations for the New York Lawyer: Selected Aspects, Trusts and Estates Law Section Program Book, NYSBA (Jan. 2005) (49 Pages)

QTIP Trusts in New York: Quite an Earful, Second Annual Sophisticated Trusts and Estates Law Institute, NYSBA (Nov. 2004) (65 Pages)

Trends and Issues Regarding Selected Testamentary Substitutes, Trusts and Estates Law Section Program Book, NYSBA (Apr. 2003) (64 Pages)

SPEECHES:

Capital Region Estate Planning Council, 2016 – "Towards a Modern Trust Code for New York"

New York State Bar Association, Trusts and Estates Law Section, 2015 Annual Meeting, "TOWARDS A MODERN TRUST CODE FOR NEW YORK: REVOCABLE TRUSTS PROVISIONS IN THE INTERIM REPORT"

ACTEC, State Laws Committee, Fall 2014, "New York's Ongoing Evaluation of the UTC: Can UTC (and Non-UTC) States Benefit?"

New York State Bar Association, Eleventh Annual Sophisticated Trusts and Estates Law Institute, 2013 – "The Uniform Powers of Appointment Act"

New York Bankers Association, "Towards a Modern Trust Code for New York: A Work in Progress"

Ira Mark Bloom

New York State Bar Association, Tenth Annual Sophisticated Trusts and Estates Law Institute, 2012 – "Powers of Appointment"

Mortimer H. Hess Memorial Lecture, "The Remarkable Power of Appointment Device" (Presented in May 2012 at the Bar of the City of New York)

Fourth Annual Estate Planning and Community Property Law Seminar, Texas Tech University School of Law, 2012- "Powers of Appointment under the Restatement (Third) of Property"

Thirty First Southern California Tax & Estate Forum, 2011- "Powers of Appointment under the Restatement (Third) of Property"

ACTEC Symposium on Uniform Probate Code (Univ. of Michigan Law School), 2011- "Commentaries on Evaluating Rules and Standards"

Capital Region Estate Planning Council, 2011 – "Estate Planning in New York"

New York State Bar Association, WEBCAST, 2010 – "Powers of Attorney"

New York State Bar Association, Seventh Annual Sophisticated Trusts and Estates Law Institute, 2009 – "Powers of Attorney"

New York State Bar Association, Trusts and Estates Law Section Fall Program, 2009 – "Powers of Attorney"

Bar of the City of New York, 2009 – "Powers of Attorney"

Ira Mark Bloom

New York State Bar Association Webcast
Moderator, 2009 – "Powers of Attorney"

New York Surrogate's Association, Annual Spring
Meeting, 2009 – "Legislative Developments"

Symposium on the Law of Succession in the 21st
Century, UCLA School of Law (Feb. 2009) – "The
Revocable Trust Device: A Matter of Life and
Death"

New York State Bar Association, Sixth Annual
Sophisticated Trusts and Estates Law Institute,
2008 – "Powers of Appointment"

Symposium, Trusts and Estate Law, Ohio Northern
University (Mar. 2008) – "Powers of Appointment
under the Restatement (Third) of Property"

New York State Bar Association, Third Annual
Sophisticated Trusts and Estates Law Institute,
2005 – "Planning Considerations for the New
York Estate Tax"

New York State Bar Association, 2005 – "Trust
Drafting Considerations for the New York
Lawyer"

New York State Bar Association, Second Annual
Sophisticated Trusts and Estates Law Institute,
2004 – "QTIP Trusts in New York: Quite an
Earful"

New York State Bar Association, 2003 – "Trends
and Issues Regarding Selected Testamentary
Substitutes"

Ira Mark Bloom

Cleveland-Marshall College of Law, 2000 – “How Federal Transfer Taxes Affect the Development of Property Law”

New York State Bar Association, 1998 – “Revocable Trusts”

American Bar Association, 1993 – "Elective Share Reform"

New York State Bar Association, 1992 – "Changes in Probate Law"

Albany Law School, Government Law Center, 1992 – "Trusts for Disabled Persons"

New York State Bar Association, 1992 – "Federal Income Taxation of Trusts and Estates"

Albany Law School, Continuing Legal Education, 1992 – "Estate Planning"

Albany Law School, Continuing Legal Education, 1991 – "Estate Planning"

New York State Bar Association, 1990 – "Overview of Federal Transfer Taxes"

Syracuse University Tax Institute, 1989 – "Planning for Married Couples"

New York State Bar Association, 1989 – "Overview of Income Taxation of Decedents, Estates and Trusts"

New York State Bar Association, 1988 – "Marital Deduction Formula Clauses"

New York State Bar Association, 1987 – "The New Generation-Skipping Transfer Tax"

Ira Mark Bloom

Albany County Bar Association, 1987 – "Coping with the New Generation-Skipping Transfer Tax"

New York State Bar Association, 1986 – "Changes Affecting Individuals under the Tax Reform Act of 1986"

Albany Law School, Third Annual Estate Planning Institute, 1982 – "State Law Considerations: Selected Problems"

Joint Annual Meeting of CPA and Bar Chapter of Albany Area, 1981 – "The Effect of ERTA on Federal Transfer Taxation"

Albany Law School Estate Planning Conference, 1979 – "Recent Developments in Federal Transfer Taxation"

Tulane Tax Institute, 1978 – "Recent Judicial and Administrative Developments in Federal Estate and Gift Taxation"

University of New Orleans Estate Planning Institute, 1978 – "Coping with Generation-Skipping Transfer Taxation"