



James A. Goldsmith

Of Counsel

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Cleveland - 216.583.7114

Jim's clients benefit from his more than 35 years of experience in all aspects of trust and estate planning and administration and succession planning. He has counseled clients in matters involving disputes among beneficiaries and fiduciaries, as well as defending claims filed in state courts against both corporate and individual fiduciaries. He has also served as special counsel and an expert witness to others in matters involving estate planning and administration issues. His expertise also includes taxation, employee benefits, and corporate law. When developing tax-planning strategies for clients, he strives to reduce, defer, or eliminate the imposition of federal and/or state transfer taxes in connection with achieving estate-planning goals. Among other honors, he was named to *The Best Lawyers in America*®, Trusts and Estates and is a Fellow of the American College of Trusts and Estates Counsel.

Education

- University of Denver (B.S.B.A., 1977)
 - Management
- Case Western Reserve University School of Law (J.D., 1980)

Bar Admissions

- Ohio
- Florida
- U.S. District Court, Northern District of Ohio
- U.S. Tax Court

Professional Affiliations

- American Bar Association (*Taxation and Real Property, Probate and Trust Law Section*)
- Ohio State Bar Association (*Estate Planning and Probate Law Section*)
- Florida Bar Association (*Estate Planning and Probate Law Section*)
- Cleveland Metropolitan Bar Association (*Past Chair, Estate Planning, Probate and Trust Law Section; Chair, 1992 Estate Planning Institute*)

Practices & Industries

- Business Succession Planning
- Trusts & Estates
- Fiduciary Services
- Business Law
- Tax

- American College of Trust and Estate Counsel Fellow
- Estate Planning Council of Cleveland
- Cleveland Society of Estate Analysts

Community Involvement

- Joyce M. Stielau and Herbert W. Stielau Foundation (*Co-Director*)
- Case Western Reserve University Estate Planning Advisory Council (*Member*)
- Cleveland Advisory Board of Facing History and Ourselves (*Board Member*)
- Hockey Humanitarian Award Foundation (*Trustee*)
- University Hospitals Diamond Advisory Group (*Chair*)
- Canine Companions for Independence (*North Central Region Fund Development Committee*)
- Menorah Park Foundation (*Former Board Member*)
- Planned Lifetime Assistance Network of Northeast Ohio (PLAN) (*Former Board Member*)
- Shaker Schools Foundation (*Former Trustee*)
- Cleveland Chapter of the American Technion Society (*Former Board Member and Co-Chair*)
- Shaker Historical Society (*Former Board Member*)
- Oakwood Club (*Former Board Member and Officer*)
- Suburban Temple (*Member, Finance Committee; Former Board Member*)
- Shaker Youth Hockey Association (*Former Board Member and President*)

Awards & Honors

- Named Corporate Honoree for the 25th Anniversary of Facing History & Ourselves Cleveland Benefit (2024)
- Named to *The Best Lawyers in America*, Trusts and Estates; Litigation – Trusts and Estates (2001-2026)
- Named to the Ohio Super Lawyers list (2004-2026)
- Named to the Shaker Schools Alumni Hall of Fame (2023 *Inductee*)
- Received the Estate Planning Council of Cleveland's Distinguished Estate Planner Award (2022)
- Received the Distinguished Advisor Award from University Hospitals (2019)
- AV Preeminent® Peer Review Rated – Martindale-Hubbell®
- Named one of Northeast Ohio's "100 Most Connected" by *Crain's Cleveland Business* (2015)
- Named a "Leading Lawyer" in Northeast Ohio in a survey of lawyers by *Inside Business Magazine* (2001-2011*) *2011 final year of survey
- Named a "Top Lawyer" by *Northern Ohio Live* magazine (August 2003)

Experience

- Has over 35 years of experience in handling all aspects of trust and estate planning and administration.
- Counsels corporate and individual executors, personal representatives, and trustees on all matters relating to their duties and responsibilities as such.
- Consults with counsel from other firms as an expert in assisting them in the handling of matters both in and out of the court system.
- Counsels individuals and families in structuring various methods of achieving financial goals and the distribution of wealth, while minimizing the imposition of federal estate, gift, and generation skipping transfer taxes.
- Designs and implements various estate planning arrangements for clients utilizing revocable and irrevocable trusts, family partnerships, and limited liability companies.
- Consults with business owners to structure and implement business succession plans.

News & Media

August 21, 2025

UB Greensfelder Attorneys Recognized in The Best Lawyers in America® 2026 List

December 17, 2024

Ohio Super Lawyers Recognizes 57 UB Greensfelder Attorneys in 2025

September 27, 2024

UB Greensfelder Attorney James A. Goldsmith Selected as Corporate Honoree for Facing History & Ourselves 25th Anniversary Cleveland Benefit

August 15, 2024

UB Greensfelder Attorneys Recognized in The Best Lawyers in America® 2025 List

December 29, 2023

Ohio Super Lawyers Recognizes 50 Ulmer Attorneys in 2024 Lists

August 17, 2023

Ulmer Attorneys Recognized in The Best Lawyers in America® 2024 Report

March 30, 2023

Is Your AI-Generated Content Entitled to U.S. Copyright Protection?

January 6, 2023

Ohio Super Lawyers Recognizes 69 Ulmer Attorneys in 2023 Lists

August 18, 2022

Ulmer Attorneys Recognized in The Best Lawyers in America® 2023 Report

June 8, 2022

Estate Planning Council of Cleveland Honors Ulmer Partner James A. Goldsmith

With Distinguished Estate Planner Award

January 4, 2022

Ohio Super Lawyers Recognizes Ulmer Attorneys in 2022 Lists