



Peter J. Bietz

Peter is a partner in the firm and advises individuals, families, and business owners on sophisticated estate planning, trust and estate administration, and complex tax matters. His practice includes designing, implementing, and administering customized estate plans, wills, and advanced trust structures, with a focus on long-term flexibility, tax efficiency, and multigenerational planning.

In addition to personal planning, Peter works closely with entrepreneurs and small business owners to integrate business, tax, and estate planning strategies. His experience in both private practice and as Senior Trust Counsel to a Delaware trust company gives him a rare, behind-the-scenes perspective on fiduciary decision-making and the practical realities of administering complex trusts. Having also worked for a closely held business earlier in his career, Peter brings a pragmatic, business-minded approach to advising clients who are building, scaling, or transitioning wealth.

Peter has been practicing law for over 15 years and has had articles published in the *Pennsylvania Law Weekly*. He currently serves as Vice President and a member of the Executive Committee of the Delaware County Estate Planning Counsel and is a graduate of the Mid-Atlantic Fellows Institute, a prestigious program of the American College of Trust and Estate Counsel. These roles reflect his active leadership and recognition within the estate planning profession. He is admitted to practice in Pennsylvania and New York, is admitted to practice before the United States Tax Court and maintains inactive bar membership in Massachusetts.

Peter earned his B.S. in Finance, with a minor in Business Law, from The Pennsylvania State University. Before law school, he worked as an accountant for a small business, experience that continues to inform his tax-focused and numbers-driven approach to planning. He received his J.D. from Boston University School of Law and his LL.M. in Taxation from Villanova University Charles Widger School of Law.

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