

MICHIGAN LAWYERS WEEKLY

A sidebar with ... Robert Kaplow

By Thomas Franz

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Southfield attorney Robert D. Kaplow was recently recognized by the Jewish Historical Society of Michigan (JHSM) with the Leonard N. Simons Lifetime Achievement Award.

The JHSM has been around since 1959, and Kaplow is just the fourth person to be given the lifetime award.

What kind of honor is it to be just the fourth recipient of this award?

It's certainly an honor and quite surprising it's only been given out four times. In all honesty, I don't know if I deserved it but I certainly appreciate the award and its significance.

You were once president of the JHSM, what are you most proud of what you were able to accomplish?

I'm very proud of the growth of JHSM. When I first came on the board, it was a small board and we were meeting in someone's living room. Now, we have a board of 17 members and an advisory board of more than 30 members.

One of the great things about this organization is that the past presidents are still involved and still have a vote. Many of the past presidents actively participate in meetings. It's not one of those organizations where you serve your time and then float away into the sunset. It speaks a lot for the quality of work the JHSM is doing that the past presidents are so interested in continuing.

How have the group's school tours developed since you helped to start those?

Our programs have grown substantially.

With the tours, we take students mostly from Jewish schools and take them into downtown Detroit and show them their history starting in 1762 when the first Jewish settler came to Detroit from Montreal.

Our goal really is to celebrate Jewish culture and the experiences of Jews in Michigan. We go into the classrooms of Jewish schools, and the kids learn about what it was like growing up and what it was like to be a Jew in Detroit in the old days.

You helped found the JHSM Heritage Foundation, what kind of need was there to create the foundation?

We are not part of the Jewish Federation that people can contribute to and then they parcel out money to groups, so we had to have our own fundraising and much of our own income was based on annual memberships and then a small amount to attend various functions.

Over the years, we felt the need to build up an endowment to support JHSM, so now we have a substantial endowment and we use it to distribute to the historical society 5 percent of the assets on a rolling basis each year. That helps to support a lot of programs that otherwise might not come to fruition.

We've fundraised more than \$1 million. Typically, we distribute \$50,000 per year to the historical society.

How is your legal work reflected in your involvement with JHSM?

It gives me an opportunity to practice some of what I do in the real world.

I've been able to assist in various corporate issues. I've been able to use my legal training on a pro bono basis to assist the society and foundation. In trying to raise money for the foundation by understanding tax laws and estate tax laws when I meet with potential donors, I certainly understand that very well.

What has kept you in estate planning and corporate tax law?

It's feeling good about helping people. It feels good especially on the estate planning side to set up a plan for the family that is going to protect them and accomplish what the parents want to have happen.

When somebody unfortunately dies, to see that the plan is working the way we anticipated, that is very fulfilling. The most important thing is to structure the estate plan so the family feels good about it.

What is a trend in cases you've been seeing recently?

Now we have a very high estate tax exemption of around \$11 million, or \$22 million for a couple, and last year when we had a lower rate it was more of an issue.

Unfortunately, there are not many people who are going to be subject to an estate tax, so a lot of people feel they don't need to have an estate plan, and that's not really the case.

If it's someone who has a family, it doesn't matter how much money they have, they still need to have an estate plan to protect their children.

They need to make sure they don't receive money at age 18 and make sure there are guardians to take care of a minor child and so forth. We're seeing them focus away from estate tax issues to more general estate planning and also focusing more on income tax planning.

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