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Stephen Sondheim Leaves Rights to His Works to a Trust

The trust will determine what happens to the intellectual property of the celebrated lyricist and composer, who died in November.



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Stephen Sondheim left the rights to all of his work — including his contribution to musicals such as “Sweeney Todd” and “Into the Woods,” as well as any unfinished shows — to a trust that will manage his estate.

The trust will now determine what happens to the acclaimed composer and lyricist’s intellectual property, as well as all other property that he left behind when he died last fall.

The plan for handling Sondheim’s assets is described in a probate petition signed last month and filed with Sondheim’s will in New York Surrogate’s Court. The filings were previously reported by The New York Post.

The probate petition says that the estimated value of Sondheim’s personal property at the time of his death was between \$500,000 and \$75 million, but three estate lawyers advised caution in interpreting those numbers, which they said are often rough estimates, and which would not reflect the value of any property Sondheim had placed in a trust during his lifetime.

“\$75 million is the estimated ceiling of the value of the assets that were in his name, which pass under the will to the Stephen J. Sondheim Revocable Trust,” T. Randolph Harris, a partner in the law firm McLaughlin & Stern, said when asked to help interpret the filings. “Although it is possible that his estate contains other assets not passing under the will, it appears likely that the \$75 million in the probate document filed with the court constitutes the bulk of his estate.”

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Sondheim, who had spent much of the pandemic at his country house in Roxbury, Conn., died in Connecticut on Nov. 26. The cause of death, according to a death certificate, was cardiovascular disease.

The court filings include two documents — a will, written in 2017 with the estate lawyer Loretta A. Ippolito, that leaves all of his property to the revocable trust, and a probate petition, put together by Sondheim's longtime friend and lawyer F. Richard Pappas, that lists beneficiaries of that trust.

Alison Arden Besunder, a partner at Goetz Fitzpatrick, said reliance on a revocable trust was a common estate planning technique. "Among other benefits, a revocable trust affords privacy to public figures and celebrities in the administration of their affairs," she said.

The beneficiaries of the trust include a number of prominent organizations: the Smithsonian Institution, the Library of Congress, the New York Public Library for the Performing Arts, the Irish Repertory Theater and the Dramatists Guild Fund; the Museum of the City of New York is listed as a "contingent beneficiary," but the filing does not specify what the contingency is. The trust will also benefit a Stephen Sondheim Foundation, once that is created.

A dozen individuals are also listed as beneficiaries, including friends, neighbors and former assistants. Among them: Sondheim's husband, Jeff Romley, and one of Sondheim's best-known collaborators, James Lapine. (Sondheim and Lapine shared a Pulitzer for writing "Sunday in the Park With George"; their other collaborations included the musicals "Into the Woods" and "Passion.") Also listed as beneficiaries: Peter Jones, a playwright who was once romantically involved with Sondheim; Steven Clar, who was Sondheim's assistant; Peter Wooster, a designer who lived in a small house on Sondheim's Connecticut property; and Rob Girard, who is Wooster's gardener.

"The probate papers tell you who the beneficiaries are, but not who gets what, and that's the point here," said Andrew S. Auchincloss, an estate lawyer with Schlesinger Lazetera & Auchincloss. "It's being kept private."

Benjamin Weiser contributed reporting.