Chambers

High Net Worth
2020

Leading HNW Professionals worldwide

USA California

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How lawyers are ranked

Every year we carry out thousands of in-depth interviews with clients in order to assess the reputations and expertise of business lawyers worldwide. The qualities we look for (and which determine rankings) include technical legal ability, professional conduct, client service, commercial awareness/astuteness, diligence, commitment, and other qualities most valued by the client.

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Private Wealth Law
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Farella Braun + Martel LLP
Hopkins & Carley
Perkins Coie LLP
Sideman & Bancroft LLP *
Band 3
Shartsis Friese LLP
Manatt Phelps & Phillips LLP
Withers Bergman LLP *
* *Indicates firm / individual with profile.*
◊ *(ORL) = Other Ranked Lawyer.*
Alphabetical within each band. Band 1 is highest.

Private Wealth Law
California: Northern
Leading Individuals
Band 1
Kwon Julie M. *McDermott Will & Emery LLP*
Moore M. Read *McDermott Will & Emery LLP*
Packer Charles *Hopkins & Carley*
Band 2
Dodd Jill *Manatt Phelps & Phillips LLP*
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Kahn Ellen I *Sideman & Bancroft LLP*
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McCabe Patrick *Shartsis Friese LLP*
Mitchell James *Coblentz Patch Duffy & Bass LLP*
Pierce Hilary *Sideman & Bancroft LLP*
Scott Audrey *Loeb & Loeb LLP*
Sugarman Myron *Loeb & Loeb LLP*
Von Herrmann Susan *Perkins Coie LLP*
Band 3
Bushnell Meredith R. *Venable LLP*
Gilman Lara *Farella Braun + Martel LLP*
Gutierrez Laurelle *McDermott Will & Emery LLP*
Larson Genevieve *Withers Bergman LLP* *
Leibovitz Goodwin Paula *Perkins Coie LLP*
Mannon Jaime *Coblentz Patch Duffy & Bass LLP*
McCall Jennifer Jordan *Pillsbury (ORL) ◊* *
Up-and-coming individuals
Carey Caitlin *Perkins Coie LLP*
Crafton Fluet Katrina *McDermott Will & Emery UK*
Edwards Mitchell *Coblentz Patch Duffy & Bass LLP*
Zaragoza Danielle *Shartsis Friese LLP*

Private Wealth Law
California: Southern
Leading Firms
Band 1
Loeb & Loeb LLP
Band 2
Katten
McDermott Will & Emery LLP
Proskauer Rose LLP
Venable LLP
Withers Bergman LLP *
Band 3
Greenberg Glusker Fields Claman
Weinstock Manion, A Law Corporation *

The editorial is in alphabetical order by firm name.

Coblentz Patch Duffy & Bass LLP

The team at Coblentz offers affluent individuals, families and closely held businesses a number of services, including estate, tax and philanthropic planning.

"Everyone that I have dealt with at the Coblentz firm is very bright and very talented," one commentator notes, explaining: *"Besides knowing their subject matter well, they all have tremendous people skills from the litigation attorneys down to the legal secretaries and paralegals."* The commentator adds: *"Another strength is that they try and resolve an issue in a fair and sensible fashion. They seem to have respect for the other side, which in my opinion has helped solve matters sooner rather than later. As a whole, I find that everyone I have worked with has had very good mediation skills."*

Notable practitioners

Philip Feldman assists wealthy individuals and families with income, gift and estate tax planning, as well as philanthropic planning. One insider enthuses that *"his competency is off the charts – if he's not the most experienced in San Francisco, he is damn near it,"* explaining: *"He does a good job at reading clients and knowing when to be soft. He knows how to make complex matters less intimidating, and he has a very good personable demeanour."* Another interviewee notes: *"I refer work to him. He is very responsive, which I appreciate, as do my clients. I enjoy working with him."*

James Mitchell has a wealth of experience advising high net worth clients on tax planning and trust and estate administration and planning. *"It is a delight to work with him and I have a lot of respect for him,"* a source says, adding: *"He is good at complicated trust administration."* An insider says that *"he does a good job following up and checking in with clients,"* and further continues that *"he does a good job engaging with the client, making sure the ball doesn't drop just because the client isn't thinking about it."* One interviewee notes: *"He is someone who is very good at explaining concepts in a simple manner. He puts people at ease and has a good demeanour."*

Jaime Mannon offers affluent individuals and families assistance with estate and gift tax planning and cross-border tax planning. One source comments that *"she is extremely knowledgeable in her field of expertise, very professional, and appears to me to stay on top of new developments relating to her field of expertise,"* and adds: *"She is patient when explaining complex topics."* Another source notes: *"She is very smart. I think she has a high emotional intelligence, she reads the room well and understands her audience."*

Mitchell Edwards is *"definitely an up-and-coming guy,"* one market insider reports. He assists high net worth clients with estate planning and administration matters. *"I would send tech clients to him,"* an interviewee says,

Private Wealth Law
California: Southern
Leading Individuals
Band 1
Bishop Leah M *Loeb & Loeb LLP*
Feinman Abby L.T. *Katten* *
Frimmer Paul N *Loeb & Loeb LLP*
Gaswirth Mitchell M *Proskauer Rose LLP*
Katzenstein Andrew M *Proskauer Rose LLP*
Lurie Jonathan C *Venable LLP*
Mooradian George T *Baker & Hostetler (ORL)* ◊
Pelavin Alyse N *Loeb & Loeb LLP*
Tobisman Stuart P *Loeb & Loeb LLP*
Band 2
Howard Nancy *Sheppard, Mullin, Richter*
Johnston Carol A. *Katten* *
Mulrooney Michele *Venable LLP*
Pearl Nicole M. *McDermott Will & Emery LLP*
Strauss Robert *Weinstock Manion, A Law*
Zwicker Laura A *Greenberg Glusker Fields Claman*
Band 3
Cutrow Allan *Mitchell Silberberg & Knupp (ORL)* ◊
Graham Michelle B *Withers Bergman LLP* *
Harris Rachel J *Loeb & Loeb LLP*
Heller Lawrence H *Greenberg Traurig, LLP (ORL)* ◊
Hoffman Paul Gordon *Hoffman, Sabban (ORL)* ◊
Loeb Jeffrey M *Loeb & Loeb LLP*
Newman David *Mitchell Silberberg (ORL)* ◊
Reimann Nancy Baldwin *Sheppard, Mullin, Richter*
Rosen-Prinz Michael *McDermott Will & Emery LLP*
Sczudlo Paul *Withers Bergman LLP* *
Shore Sussan H *Weinstock Manion, A Law*
Trytten Steven E. *Henderson Caverly Pum (ORL)* ◊
Up-and-coming individuals
Glasgow Elizabeth *McDermott Will & Emery LLP*
Lipson Stefanie *Greenberg Glusker Fields Claman*
* *Indicates firm / individual with profile.*
◊ *(ORL) = Other Ranked Lawyer.*
Alphabetical within each band. Band 1 is highest.

Private Wealth Disputes
California
Leading Firms
Band 1
Holland & Knight LLP *
Sacks Glazier Franklin & Lodise LLP
Band 2
Loeb & Loeb LLP
Sheppard, Mullin, Richter & Hampton LLP
Senior Statespeople
Senior Statespeople: distinguished partners
Ross Bruce S *Seyfarth Shaw LLP (ORL)* ◊
Leading Individuals
Band 1
Franklin Terrence M. *Sacks Glazier Franklin*
Sacks Robert *Sacks Glazier Franklin & Lodise LLP*
Streisand Adam F *Sheppard, Mullin, Richter*
Thoreen Vivian L. *Holland & Knight LLP*
Band 2
Lodise Margaret *Sacks Glazier Franklin & Lodise*
Nelson David C *Loeb & Loeb LLP*
Nelson Stacie Polashuk *Holland & Knight LLP*
Vidal Gabrielle *Loeb & Loeb LLP*
Band 3
Barton Robert *Holland & Knight LLP*
Caverly Kristen *Henderson Caverly Pum (ORL)* ◊
Lee Rodney C. *Loeb & Loeb LLP*
van Brunt Nicholas *Sheppard, Mullin, Richter*

explaining: *"He does a good job and he is very efficient. He can handle complex cases very well, he gets things done so fast it's like feeding it to a woodchipper. He is always responsive and always invested in the client. He can crank through work quickly and efficiently. I enjoy working with him."* Another source agrees, adding: *"He is good for younger tech-related clients, he has a really strong practice for this. He is very approachable and knowledgeable on tech issues."*

Farella Braun + Martel LLP

Farella Braun + Martel offers a range of services to high net worth individuals, families and closely held businesses services including estate planning, trust administration and succession planning. *"They are a very respected San Francisco firm,"* one source notes. Another source says: *"They have a good local presence, good talent and a sizeable private client group in a large firm."*

"We use them a lot and recommend clients to them quite a bit. They are a very good firm," one interviewee comments, while another interviewee describes them as *"A+ professionals."*

Notable practitioners

Lara Gilman advises high net worth individuals, families and closely held businesses on estate and succession planning. An interviewee describes her as *"very able and responsive. She is easy to work with and a very good communicative partner."* Another says: *"She is very collaborative, works well in a team and I think she is creative for clients and has their best interests at heart."*

Greenberg Glusker Fields Claman & Machtinger LLP

Greenberg Glusker offers affluent individuals estate, trust and tax planning services. *"Greenberg Glusker have been excellent in this market,"* says one interviewee, continuing: *"They have been on top of each issue that we have dealt with and work proactively and collaboratively with us to achieve the best outcome. We have been very satisfied with the relationship."*

A source remarks: *"They are incredibly skilled, they know what they are doing. They are responsive and have super prompt turnaround. They always feed me information in a way that is easy to understand and they do it kindly."*

Another source comments: *"They are excellent at what they do, very professional. The team has a good way with clients, in addition to being technically proficient. Their service and communication style appeals to our client base."*

Notable practitioners

Laura Zwicker chairs the firm's private client services group and assists wealthy clients with estate, tax and business succession planning. *"She is the lawyer I work with the most in California and, to my mind, she is the most internationally minded of the tax, trust and estate lawyers,"* one interviewee comments, adding: *"She provides good advice all round, she understands the international issues and builds solutions that work. She has that real international grasp. Everything I see is really excellent and my clients say so too."* Another source notes: *"Laura Zwicker is very experienced and an excellent adviser. She has a thorough understanding of the issues that come up with high net worth family offices and large estate planning models. She is prompt and detailed when necessary and commercially experienced when required."*

Stefanie Lipson enters the table for the first time this year. She advises high net worth clients and family businesses on a range of matters including trust and estate administration and planning, business succession planning and tax planning. *"She is a good lawyer, a good up-and-comer; she has a hunger for knowledge and for getting better, she is always looking to improve herself and learn more,"* a California estate planner enthuses. *"She is excellent, I think really highly of her,"* says another, adding: *"I am impressed with her quality of work."*

Holland & Knight LLP

See profile on p.532

Holland & Knight has a well-regarded fiduciary litigation practice in Los Angeles and San Francisco, with an impressive depth of expertise in this niche practice area. The firm is *"excellent,"* says one source, adding: *"I know the people very well and they are a terrific firm. They actually do have people specialised in trust and estate litigation; this is a real benefit."* Another interviewee says H&K does *"an excellent job,"* adding: *"What I really like is that they have a wide range of attorneys they can put on various cases."*

The team also wins praise for its skills and expertise. *"The attorneys at Holland & Knight are not only logical and analytical, but they also display a great deal of creativity in their problem solving,"* reports one interviewee. Another comments: *"I use them for matters where there is a critical element of expertise needed, whether estate-related or litigation-related. They are my favourite firm and the best* *firm with which I work."*

Notable practitioners

One client says **Vivian Thoreen** was *"the zealous advocate we needed"* in their case, adding: *"She responded to developments effectively and handled opposing counsel with poise."* A fellow trusts and estate litigator describes Thoreen as *"first-rate – there's no doubt about that,"* explaining that *"she is a leader, and is recognised across the state as one of the best trial lawyers."* Another interviewee reports that Thoreen *"is very well respected in court"* and *"gets things done quickly; she is a fast study and can pick up and help out on most topics right away."*

One interviewee describes **Stacie Polashuk Nelson** as *"fantastic; one of the best, a great lawyer and a great person."* Nelson has experience representing clients in contentious trust, estate and conservatorship matters, as well as accounting disputes. A client reports that *"she has been assertive when we needed her to be and she has also let me know when I'm able to handle things on my own. Stacie is very reasonable and doesn't lead me down a path that isn't worth it."* A California attorney remarks: *"She knows what she is doing and I find her collegial – even when we are on opposing sides, she is very nice to deal with and very cordial. I respect her."*

Robert Barton acts for individuals, families and charities on a range of matters including trust and estate litigation, conservatorship and guardianship contests and financial elder abuse. One source describes Barton as *"one of the most loyal and likeable attorneys I know,"* adding: *"He cuts right through all the noise and gives it to you straight, and he's sophisticated enough to sift through all the nuances and complexities. He was also tremendously responsive and available – he was there when we really needed him."* Another source notes: *"Robert Barton is a very solid, young attorney with a lot of wisdom and a calm demeanour which helps in these estate matters. He is very bright and he is excellent dealing with a mixed bag of emotions clients experience."*

Hopkins & Carley

The team at Hopkins & Carley assists high net worth individuals with a range of matters including trust and estate administration, charitable gift planning and wealth transfer. *"They have a really good trust and estate practice and a very strong team,"* one source comments.

"If we have clients or people who we need to refer, we suggest they talk to them," an interviewee notes, explaining: *"They are the largest firm in this area, they have the most well-rounded capabilities. They have been in this practice area for quite some time."*

Notable practitioners

Charles Packer *"is fabulous, he is terrific, absolutely lovely,"* one interviewee enthuses, continuing: *"He is very informative, knowledgeable and handles complexities well. He is a prince to work with and so smart."* Packer advises affluent individuals and business owners on estate, gift and philanthropic planning. *"I think he is very knowledgeable in estate planning,"* reports a source, adding: *"He is very responsive, extraordinarily well connected and very experienced. He is a great partner to work with."* Another says: *"He is very experienced and client-oriented. He is excellent at the job, very personable – clients enjoy working with him. He is very good at relating to clients and translating their needs."*

Katten

Katten assists high net worth individuals, families and their businesses with business succession planning, tax planning and philanthropic planning.

"The team is very thorough and thinks outside the box for creative ways to approach a problem," one interviewee notes, continuing: *"They collaborate with one another to come up with the most practical solutions."*

Notable practitioners

Abby Feinman (see p.491) assists high net worth clients and closely held businesses on matters including trust and estate planning and charitable giving. *"She is extremely strong technically, probably the best I have worked with and I have worked with many, but she also explains things in a simple and easy to understand manner,"* says one source. Another source notes: *"Her strengths include the depth of her knowledge, both in her area of expertise and outside of her primary area of focus. She asks great questions which always prompt us to dig deeper than just on the surface and to look for creative solutions. She has a professional approach to all matters and has a practical outlook for solving problems."* One interviewee comments: *"I am so comfortable with her. She is very bright, she stands out so much – she is a super star."*

Carol Johnston (see p.457) *"is one of the hardest-working attorneys I have ever met,"* one interviewee says, adding: *"When she is not working on client matters I am sure she is researching new trust and estate law."* Another reports that Johnston is *"able to synthesise complicated estate and tax matters and communicate that information in a very clear manner to her clients."* A market insider comments: *"She is highly competent technically, she knows the ins and outs of the dynamic world of tax and estate planning. The best thing I like about her is her high degree of emotional intelligence; she gets along with individuals and can read people really well."*

Loeb & Loeb LLP

California powerhouse Loeb & Loeb has leading trusts and estates practices in Northern and Southern California. *"I think they have more breadth and depth than anyone in LA, and they have some up North too,"* says a Los Angeles-based competitor, adding: *"They have the most people and many who are at the top of their game."* A San Francisco attorney reports that the lawyers who moved to Loeb from Cooley LLP in 2018 have a *"fine reputation"* and *"pop up all the time as competitors."*

The firm also has a strong fiduciary litigation practice. *"They have had for decades a wonderful group of trust and estate litigators who consistently perform amazingly,"* commentsone interviewee, continuing: *"I would unhesitatingly refer work to them, always. They are cost-effective and amazing attorneys."* On the non-contentious side, a fellow lawyer reports that *"I enjoy working with them; if I see I will be working with them then I am always happy as I know the partnership will be good."* Another source says: *"They have a wonderful breadth of estate planners that do tremendously fantastic work. They are all phenomenal attorneys."*

Notable practitioners

Leah Bishop *"is one of the smartest lawyers I know,"* says one source. Bishop has experience in tax planning and trust and estate administration for high net worth individuals, closely held businesses and charitable organisations. *"She is a good lawyer, and her practice is very good,"* comments one of Bishop's peers, who explains that *"she is very involved with high net worth individuals and she does a bit more charitable planning than most, which is unique. She represents very wealthy individuals very well."* A fiduciary litigator in LA says Bishop is *"my go-to estate planner,"* adding: *"Leah is great. She is wonderful, such a good attorney – the estate planner that always comes to mind."*

Paul Frimmer *"is really brilliant,"* a source says; *"he is so intelligent and smart – he has expertise like no other, especially for tax."* Frimmer advises high net worth clients on estate planning, and is known for his expertise in art law. One interviewee comments on his art law speciality, saying: *"Paul is a fine lawyer. I think he is interested in charity and art law, and has developed a real reputation in town for representing artists and collectors."* Another remarks: *"He is great, and he likes to share his knowledge in the art law area. I am very comfortable referring work to him or asking him questions – he is very collaborative and knowledgeable."*

Alyse Pelavin *"is the shining star in the prac-*

tice," states one LA attorney, and another interviewee describes her as *"super smart, very responsive and very creative – the best trust and estate lawyer I have ever worked with."* Pelavin is seen as *"a stand-out individual for business and gift planning"* and someone who is *"very creative and open to ideas."* Another lawyer says: *"If I could hire anybody to be my successor, it would be her. She is as good as they get. She is very talented, very responsive, clients love her and she seems to have all the technical skills. She is a real force to be reckoned with."*

Stuart Tobisman has a long-time reputation as a top estate planning specialist in Los Angeles. California interviewees consider Tobisman to be *"an icon in the estate planning area,"* a *"very knowledgeable, extremely detail-oriented and thoughtful"* practitioner who is also *"a lovely, lovely gentleman and technically very good."*

David Nelson *"is the smartest guy in the room,"* says one interviewee. Nelson is co-chair of the firm's trust and estate litigation practice. He has experience representing high net worth individuals in disputes regarding trusts, estates and conservatorships. One interviewee describes him as a *"marvellous attorney,"* and another comments: *"He handles himself well – I have found himself to be an honourable guy and to have a reasonable manner."*

Audrey Scott assists high net worth individuals and families with trust administration, wealth transfer and estate and gift taxation. *"She is a brilliant technician and she really, really develops a quick rapport and trust with the clients I refer to her – she stands out,"* one insider reports. Another interviewee comments: *"I am very comfortable referring clients to her. I think on the gift structuring side of things, working with ultra high net worth individuals on proposed IPOs she is very strong."* A third source adds: *"She is great, I would 100% send a client to her with no qualms. She is terrific and easy to work with."*

Myron Sugarman is *"a stalwart of trust and estates, a founder in this market,"* reports a source, adding: *"I think he is excellent, I really admire him."* Sugarman has a wealth of experience representing clients on matters to do with estate and tax planning and charitable giving. Another interviewee says: *"He has incredible energy, a legend. He is good for work in Silicon Valley."*

Gabrielle Vidal is co-chair of the firm's trust and estate litigation practice. One source remarks: *"I think so highly of her, she is such an impressive attorney. I have nothing but good things to say about her, she is the whole package: a wonderful advocate, very smart, cares about her clients and her cases. I give her the highest praise."* Another interviewee says: *"She is the best, she is amazing, she is at the top of her field. She is aggressive when she needs to be, but she knows when it is appropriate. I refer big litigation matters to her."*

Rachel Harris is known for her work on domestic and international estate planning, and is chair of the firm's international trust and estate planning practice. One source recognises that *"she focuses on the international area,"* and adds: *"I think she is really smart and a very good advocate."* Another describes Harris as *"very good, smart, responsive and a pleasure to work with."*

Rodney Lee assists high net worth clients with a range of litigation matters, including financial elder abuse and breach of fiduciary duty. *"I like Rodney, he is a smart lawyer,"* one source says, and another notes: *"He has a wonderful personality and counsels rather than controls."*

Jeffrey Loeb advises high net worth individuals and families with estate planning and trust and estate administration. One interviewee says: *"Jeff was incredibly patient with us – talking through a million different scenarios with us. He just had such a wonderful confidence – it was clear that there was no situation we could possibly face that he hadn't dealt with before."* This interviewee continues: *"At the end of the day, if my family or I have to activate our estate plans, it will be the worst time of our lives. In times like that, I want to be sure that my family will have someone with them who will be compassionate, professional and think of all the ramifications. And in Jeff and his firm, I feel like I have that resource."*

McDermott Will & Emery LLP

McDermott Will & Emery has a fantastic reputation in California for its trust and estates practice. *"I will say that they are one of my favourite law firms,"* an interviewee says, adding: *"They are super knowledgeable, both from an estate planning and a tax perspective. I think that they are extremely responsive and timely – we are able to wrap up matters for clients fairly quickly and thoroughly. They have a great balance."*

"I feel like I have the most knowledgeable people at the table and a team approach to serve clients," one source reports, continuing: *"They are good advocates for my clients and also solid individuals that clients have been happy to have represent them as an extension of their team. Their commitment to getting the best possible legal answer for the client is impressive."* Another source also praises the team's knowledge and experience, saying: *"Their knowledge is superior and they are confident in their application of the law so it makes it easy to trust them and rely on them to serve my clients, who are like my family."*

Notable practitioners

Julie Kwon *"is exceptionally bright, she really drills into the fine details,"* one source says. *"Julie is phenomenal – everyone would agree,"* says another interviewee, adding: *"She is at the forefront of trust and estate planning. Julie is someone I really admire, I can't say enough good things about her. Her ability to recall tax and trust law down to the citation is incredible – she is an encyclopedia of knowledge."* A third interviewee comments: *"Julie stands out. She is the person you go to when you have complex matters and you need a solution. She can accomplish sheer miracles, in fact she has done. She has been fantastic, she is my favourite – one of the best technicians I have ever seen."*

Read Moore assists high net worth individuals in domestic and international markets with a range of matters including estate and trust administration and planning, succession planning and tax controversy. One source recognises Moore as *"excellent for international cross-border estate planning work,"* and another says: *"He is very experienced with cross-border work, he is my go-to guy for international matters. He is very thorough, he will track down every issue in every jurisdiction applicable to my client."* An insider enthuses: *"I think he is very responsive and I think he is certainly an expert in this field. He thinks of creative solutions and he is a real problem solver. He always seems to easily understand what we are trying to accomplish."*

Nicole Pearl assists affluent clients with estate administration, wealth planning and business succession planning. One source states that *"she is very good with family work and multi-generational trusts,"* and another says: *"Nicole is very knowledgeable with the various estate matters and issues. She cares deeply about providing a strong customer service, as well as a positive client result on a timely basis."* A peer comments that Pearl is *"phenomenal, so smart, so thoughtful, so dedicated. She gives things 100% of her attention."*

Laurelle Gutierrez assists affluent individuals on matters including estate, tax and philanthropic planning. *"She is a real force in San Francisco, she is really good, and I enjoy working with her,"* one source comments. Another interviewee notes: *"She is a technician, but she also has excellent client skills. She is very effective working with clients, understanding needs and defining appropriate plans."* A third interviewee says that Gutierrez is *"easy to work with, fast and smart. She is very proactive and gets things done efficiently."*

Michael Rosen-Prinz assists high net worth individuals and families with estate, gift and tax planning. One interviewee recognises Rosen-Prinz as *"a good lawyer,"* and another says he is *"young, bright, and someone very active in the industry."*

Katrina Crafton Fluet advises high net worth individuals, families and charitable organisations on estate, gift and tax planning, charitable planning and succession planning. *"Katy is wonderful,"* one source comments, and another says: *"She is an essential part of the McDermott Will & Emery team. She is proactive, she ensures projects are moving and she collaborates as part of the client team for solutions."* An interviewee describes her as *"very smart, very experienced, she is prompt, gets work done and she is responsive. She is a real star."*

Elizabeth Glasgow offers high net worth clients a number of services including multi-generation wealth planning, business succession planning and charitable giving. One attorney comments: *"She is very sharp, very thoughtful and she really just does an excellent job. I think very highly of her."* An interviewee says: *"She is so easy to work with, she is so pleasant. She is really smart, so good at what she does and she is responsive. She is very dedicated to her clients and there's an added perk that she is qualified in California and New York."* Another enthuses that *"Elizabeth has a tremendous understanding of the complicated tax issues the client faces, but she is also a good listener and practical,"* and further adds: *"Elizabeth is my go-to trust and estates person. I enjoy working with her. She is on my short list for most of my client referrals."*

Perkins Coie LLP

Perkins Coie provides estate planning, trust administration and business succession planning services for affluent clients. *"They are brilliant and really care about delivering the very best advice possible,"* one source remarks; *"they do a great job of keeping the appropriate team members in the loop on all matters."*

"They are very focused on service and making sure that they are collaborating closely with us and the clients to come up with the best plan," one interviewee enthuses, adding: *"The fact that they take a collaborative approach to advising families in concert with investment advisers and so on makes our job much easier. They have a big 'we' culture, they are interested in considering different points of view to get the best deal for their clients, they are really client-focused."* This interviewee also says: *"What sets them apart is that they are focused on responsiveness, collaborating and delivering fantastic client experience. When you give a referral, you want someone who will deliver the same client service you would deliver as it reflects on you. We are extremely confident giving them as a referral as we know they will treat them fantastically."*

Notable practitioners

Susan Von Herrmann advises high net worth individuals and families on trust and estate planning, charitable giving and wealth transfer. *"She is easy to deal with, bright, knowledgeable and she has a wealth of experience,"* a commentator remarks, adding: *"She covers all her bases, she knows her stuff back to front. She is my go-to person; she stands out the most to me in San Francisco."* Another interviewee notes: *"She deals in very complex situations and has a great deal of experience advising on complex matters, so from a professional point of view when we send someone to her we know that she has the horsepower to address any situation and deliver a great client experience. It's rare to have someone who can delve into complexities but have the soft personal touch and connect with all sorts of people and build relationships."*

Paula Leibovitz Goodwin *"is in my opinion the most brilliant estate, trust and tax attorney practising in California,"* one source comments, continuing: *"Given how complex her topic is, she does an amazing job of breaking down the issues to be understandable to clients and their advisers in ways they can relate to, allowing them to make informed decisions. She is respectful of clients and their need for education before decision making."* Another interviewee states: *"I was very impressed with her expertise and her approach to trying to help solve family conflicts. I have referred people who needed sophisticated estate planning to her and she always gets exemplary feedback. She is on my top high net worth estate planning list."*

Caitlin Carey advises high net worth individuals and families on estate, trust and tax planning. *"She is really good,"* a market insider notes, continuing: *"She is so hard-working, very pleasant, very smart and responsive."* An investment adviser comments: *"She has a great bedside manner. She has the ability to ask probing questions and she is a very active listener. She can translate soft and qualitative comments of clients into advice that addresses them if they are not easily measurable."*

Proskauer Rose LLP

The Proskauer Rose private client team assists wealthy individuals and families with a range of matters, including wealth planning, trust administration and charitable planning. *"They are extremely competent, approachable and technically A+,"* one source comments.

"Proskauer has been outstanding in every aspect of their work with our family," one interviewee notes, adding: *"The quality of the work completed is always of the highest calibre; they are responsive and timely, they are personable and helpful and have been a tremendous support and resource for our family."*

Notable practitioners

"If he is not the best tax planning or estate attorney in my referral source list, I wouldn't have any idea who is," one interviewee remarks about **Mitchell Gaswirth**, continuing: *"Not only is Mitch one of the smartest guys I know, he can communicate very, very complex information in a way to clients that everyone involved can understand."* Another enthuses: *"In all my interactions with Mr Gaswirth he has shown kindness and compassion, humour and insight, and most importantly a depth of knowledge and expertise on the matters at hand. I have utmost trust in his work and enjoy and appreciate our working relationship. I couldn't be more pleased with the quality of his work and his communication with me."*

Andrew Katzenstein assists affluent individuals with probate and trust administration, estate planning and wealth transfer. One attorney describes Katzenstein as *"one of the smartest people I know"* in this practice area, and another source says Katzenstein is *"a very warm person, an excellent lawyer technically and innovative – I enjoyed working with him."* A further interviewee reports that *"Andy is a very good lawyer. He is very knowledgeable and lectures to others to pass along his knowledge, which is a good attribute."*

Sacks Glazier Franklin & Lodise LLP

The lawyers at litigation boutique Sacks Glazier *"are awesome,"* says a source, who explains that *"all they do is trust litigation – that's it – they are the best and they are well known in Southern California."* This interviewee continues: *"They bring a reputation and presence when they are on your team; they are also great at estimating outcomes, potential costs and benefits from legal strategies. They are the best we have ever worked with, and we tend to get into a fair amount of estate litigation."*

A California-based trust and estate lawyer enthuses that *"we really like them. If we have a case we can't take, we would be completely happy to refer work to them,"* and adds: *"They are reasonable people, they are intelligent and good lawyers who know the practice very well."* The attorney also says: *"If I needed a lawyer to represent me in this area, I would go to Sacks Glazier."*

Notable practitioners

Terrence Franklin *"is terrific. He is a really good litigator, really technical lawyer and very ethical. He is probably the best across the board,"* one interviewee reports. Another source says Franklin is *"very smart, and good at spotting issues,"* adding: *"He is also good at* *managing client expectations and he moves the case along without blowing things up in a way that damages the client and is difficult to control. He is not fee-driven, which is refreshing."* A fellow California litigator remarks: *"He is great to work with, whether we see eye to eye or we're against each other. He is focused on getting the best results for his clients, he is very intelligent and has the respect of the court and his colleagues."*

"I think **Robert Sacks** *is every estate planner's favourite litigator,"* says a source, continuing: *"He is so easy to work with, so well respected and fantastic at his job."* Another interviewee remarks that *"he is a really high-quality attorney,"* and explains: *"I have seen him in a number of courtrooms and he is brilliant, he has a real gravitas and depth of experience. He is so knowledgeable and has the respect of the bench."* A third commentator enthuses: *"He is a really solid trust and estate litigator. I like Bob because I feel like he has very good judgement and he can be an effective advocate. I don't ever have any hesitancy referring work his way."*

Margaret Lodise handles trusts and estates disputes. *"Meg is brilliant,"* says a source; *"she knows trust and estate law extremely well and understands the nature, cost and benefits of litigation strategy."* Lodise is also described as *"knowledgeable, pleasant to work with and an effective writer."*

Shartsis Friese LLP

Shartsis Friese's family wealth planning department assists high net worth individuals and families with estate and wealth transfer planning, trust and estate administration and charitable planning. One source states: *"I have the highest regard for the Shartsis firm and this group of highly qualified, innovative and imaginative people."*

"This firm is one of my favourite firms to work with," one interviewee enthuses, explaining: *"I've enjoyed working with the attorneys and I also like and trust them as people. It's very important for me to have a good relationship with the attorneys I work with and refer to my clients. My clients have trust in me to provide them with the best advisers."* Another interviewee reports: *"The team has been excellent. They are extremely competent and up-to-date on all legal issues concerning wealth transfer and wealth maintenance. They are always extremely prompt with any follow-up questions. In short, they are extremely competent and diligent."*

Notable practitioners

"I would say he is the dean of the estate planning community in Northern California," one source remarks about **Richard Kinyon** . Another source comments that *"Richard is at the forefront of technical knowledge in the fiduciary income tax area, he is as experienced as you can be,"* adding: *"He is one of the top technical minds in the city."* A further interviewee says they have *"the utmost respect for him,"* explaining that Kinyon is *"a true gentleman and a very smart guy. It is remarkable to me that he is still on the cutting edge; he identified this area and the need for international estate and trust expertise."*

Patrick McCabe advises high net worth clients with estate and business succession planning, as well as tax planning. *"Patrick is hard-working, loyal and strategic in his work and the advice that he provides,"* one source comments, adding: *"In my experience, he has always prioritised the client's best interests. He is tactful and effective in his communication, particularly around sensitive matters and situations. He is willing and able to be direct with clients and effectively delivers difficult news."* Another interviewee notes that *"he is able to relate to all different types of individuals and is always looked up to as the smartest person in the room,"* continuing: *"It also helps that in this day and age he always picks up the phone when you call and is always very responsive. Patrick is a great communicator and problem solver, incredibly smart and knowledgeable, has a good sense of humour, so very relatable and accessible. He is always calm, no matter the situation."*

Danielle Zaragoza assists affluent clients with estate planning, tax planning and probate and trust administration. Zaragoza is described as *"very bright, pleasant, relatable and intellectually curious,"* and as having an *"excellent bedside manner,"* as well as being *"very client-focused and very calming."* One interviewee says: *"What I like about her is that she is very friendly and nice, but also somewhat no-nonsense – she will get stuff done, I like that about her. She is prompt, responsive and gets work done for clients."*

Sheppard, Mullin, Richter & Hampton LLP

Sheppard Mullin's private wealth and fiduciary litigation team represents high net worth individuals and families in a range of disputes matters, including breach of fiduciary duty, financial elder abuse and will and trust contests. One source says: *"They are very active for private wealth disputes and very well respected. They are a good firm with good attorneys."*

"They are a strong firm and a strong practice," one commentator observes, adding: *"They have good resources, are well known for being a trial firm and they have a deep bench."*

Notable practitioners

Adam Streisand is *"a superstar"* in this market, and is *"very sought out for big-ticket litigation"* in California and across the country. He is considered to be *"an excellent attorney, the best in this field,"* and one commentator reports that *"he knows the field, he knows the law, he has a good courtroom presence and is known to all the judges."*

Nancy Howard assists high net worth clients with wealth planning and estate planning and administration. An interviewee says: *"She is one of the best known names in town. She is a very solid lawyer. She is a good lawyer for clients and very knowledgeable."* Another notes: *"She is a brilliant lawyer. I think she is very calm, very knowledgeable and very tax-oriented."*

Nancy Baldwin Reimann assists high net worth clients with estate planning and probate and trust administration. One source describes her as *"extremely capable and competent. She is truly terrific, I would happily recommend people to her."* Another source notes: *"She is bright, has a higher-end practice, cares about her clients and is very knowledgeable."*

Nicholas van Brunt represents high net worth clients on issues including trust and estates and fiduciary matters. One interviewee comments: *"He is a good lawyer and a good person. It's nice to see him on the other side, he is reasonable."* Another source says: *"I like working with him. He is so practical and super smart. He has a good demeanour and is willing to fight and stand up for his clients."*

Sideman & Bancroft LLP

See profile on p.493

"Without exception, all the attorneys at Sideman & Bancroft who I've worked with are first-class," says a source, continuing: *"Their strengths are service, service, service. They are very efficient, good-value proposition, very sophisticated estate planning."*

The firm's estate planning team offers clients services including trust and estate administration, wealth transfer planning and charitable planning. One interviewee describes the team as *"exceptionally bright, well researched, thorough and thoughtful. They are top in their industry."*

Notable practitioners

Ellen Kahn *"is the best estate planning attorney I've worked with in San Francisco,"* comments one source, adding: *"She is very creative and has a super good bedside manner."* Kahn advises high net worth individuals and fiduciaries on estate and trust administration matters, as well as philanthropic planning. An attorney says Kahn is *"one of my favourite people; she is a lovely person, a great planner and a wonderful lawyer."* Another interviewee says: *"She is very bright, and she has been in the business long enough that she is competent and confident with what she is doing. She* *is an exceptional individual, good at handling complexities and a good communicator."*

Hilary Pierce assists high net worth individuals with a range of matters, including estate planning and administration, wealth transfer planning and philanthropic planning. *"She is smart and thoughtful,"* one interviewee states, continuing: *"She has a good way with people. I would refer clients to her."* Another market insider reports: *"I send a lot of my business to Hilary. She is excellent and down to earth. She is really smart, approachable and practical."*

Manatt Phelps & Phillips LLP

Manatt Phelps & Phillips assists high net worth individuals, family businesses and charitable fiduciaries on a range of trust and estate matters. *"Manatt is a great firm for clients with complex issues as they can easily assemble a team of subject matter experts to provide a comprehensive solution,"* one commentator notes, adding: *"They are technically excellent, with deep familiarity with the most current environment and knowledge of how to artfully incorporate planning to take this into account. They are our go-to firm for clients with complex issues."*

"The team is highly qualified with excellent technical competency and expertise. Their service to my clients has been excellent," comments one interviewee. Another says: *"I think they are very thorough and knowledgeable."*

Notable practitioners

Jill Dodd *"is a great estate planning attorney,"* one commentator says, explaining: *"She combines a deep technical expertise, decades of experience, and a very human touch that enables her to easily discuss difficult issues. Her knowledge of philanthropic planning is second to none and she's frequently sought out by non-profits for advice on a variety of subjects."* Another source remarks: *"Besides Jill Dodd's impressive depth of knowledge and right on-point strategic planning ability, she is a compassionate, caring and positive individual."*

Venable LLP

Venable advises high net worth individuals and families on estate, tax and business succession planning. *"They are responsive and experts at what they do,"* one commentator reports. Another says: *"As a whole they are my go-to in most areas. They are responsive and experts at what they do."*

"The team overall has been great to work with and effective," says one interviewee, whilst another remarks: *"They are great with their clients as well as their colleagues."*

Notable practitioners

Jonathan Lurie assists wealthy individuals and families with domestic and international tax planning, estate planning and trust administration. One interviewee says: *"I think Jonathan is a good, creative tax lawyer. He does a fair amount in the international area and he focuses on the bigger picture."* One source says that *"he is very sharp and very smart,"* and another comments: *"He is terrific. He knows the international stuff really well, really creative and thoughtful."*

Michele Mulrooney assists high net worth individuals in the entertainment industry and the business world with estate planning, estate administration and cross-border tax planning. One source comments: *"She is a great partner to have on your team. She is a great educator and compassionate about doing right by all her clients."* Another interviewee notes: *"She is very great, she really cares for the clients. She is such a trusted adviser and super collaborative."*

Meredith Bushnell assists high net worth clients and business owners with trust and estate administration, business succession planning and tax planning. *"Meredith has a much more sophisticated practice than many California trust and estate lawyers, she is intellectually creative, yet paramountly practical,"* enthuses one interviewee, adding: *"Few attorneys operate at Meredith's level of intellectual sophistication while remaining practically focused on how to get real results for clients."* This interviewee also says: *"Meredith also has great interpersonal skills; it has been a genuine pleasure to get to know her."*

Weinstock Manion, A Law Corporation

See profile on p.494

Weinstock Manion is a private wealth boutique firm that offers estate planning and administration, business succession planning and charitable planning services. One commentator describes the firm's attorneys as *"extraordinarily knowledgeable in all aspects of estate planning and wealth transfer,"* and continues: *"They are creative, they are goals-based, they attempt to find solutions to complex problems and are able to communicate with clients in an understandable way."*

"My overall impression of the firm is excellent," states one source, explaining: *"They have consistently provided sensitive and timely advice, whether it relates to wealth transfer, tax strategies or personal counsel to family members. Their strength is in the care with which they handle each assignment, their understanding of the family's needs and dynamics and their ability to reason with family members."*

Notable practitioners

Robert Strauss advises high net worth individuals and families on wealth transfer planning. One interviewee comments: *"Robert Strauss is recognised throughout Los Angeles as being one of the top estate planning attorneys for clients with complicated tax challenges. Rob is patient with his clients and completes his assignments timely."* Another interviewee adds: *"He is passionate and he is a really great communicator. He has a tremendous personal belief in the recommendations he makes and he communicates them with zeal. He is creative and also a very high-quality human being."*

Sussan Shore assists affluent clients with trust and estate administration and multi-generational estate planning. *"Sussan is one of the finest estate planning and tax attorneys in Los Angeles,"* an interviewee remarks, adding: *"She has consistently offered sage advice to keep individuals from making decisions that could lead to family strife while respecting family members' wishes in their planning process."* Another commentator says: *"She is a good counsellor for clients, she is very kind and compassionate towards clients. She is a very personable lawyer."*

Withers Bergman LLP

See profile on p.439

Withers Bergman provides high net worth individuals and families with advice on domestic and cross-border matters, including estate planning, tax planning, business succession planning and charitable giving. *"The firm has some of the top trust and estate attorneys in the world,"* states a source, continuing: *"They stand out to me as being technically excellent and very nice, good people."* Another source says: *"The team is very strong, especially on international individual issues. Withers is internationally sophisticated and brings its offices around the world into solutions."*

An interviewee enthuses: *"I think that they are thoughtful, I really appreciate how they examine a number of different alternatives to the problem and they balance this with the speed, they are very quick. The speed at which they can turn around interesting alternatives is something I appreciate a lot."*

Notable practitioners

Michelle Graham (see p.491) is a partner in Withers Bergman's San Diego and Orange County offices. One interviewee remarks: *"She is a really nice person and it is easy to talk to her. She is a very big name for what she does, but she is very down to earth and she communicates very well. She can break things down very well so clients can understand, which is important for such complex cases. The way she conducts herself is excellent, she has a nice way about her."*

Genevieve Larson (see p.491) advises high net worth individuals on a range of matters including estate, succession and philanthropic planning, as well as trust administration. *"She is incredible with clients, she really puts them at ease during the most important decisions in their life,"* an interviewee says, adding: *"She is empathetic, she is pragmatic and she balances this beautifully while letting clients know what is in the realm of possibility for estate planning. She is so efficient."* Another interviewee states that *"attorneys, I find, speak a special language that a normal person may not understand,"* whereas Larson *"is able to explain things very, very clearly to both myself and the client. She can explain things in a way that is easy to understand."*

Paul Sczudlo (see p.491) is highly recommended for cross-border trusts and estate planning in Southern California. One client comments: *"Paul is the best attorney I have ever worked with in any field, period. He is very knowledgeable and professional. He is also outgoing, thorough, attentive to details and proactive. Not only does he provide me legal advice on specific issues, but he also consults me on matters that could potentially affect my interests. Paul is courteous and responsive."* This client summarises: *"It's been nothing but a pleasure working with him."*

Other Ranked Lawyers

Kristen Caverly of Henderson Caverly Pum & Trytten LLP advises high net worth clients on disputes matters, including estate and trust controversies, probate matters and contested guardianships. A source says: *"She is wonderful. She is amazingly helpful, she is a very hard worker and very intelligent. I would refer business to her any time."* Another states: *"She is really great, I really like her. She is a very good litigator, she is very impressive, capable and hard-working."*

Allan Cutrow of Mitchell Silberberg & Knupp LLP assists clients with estate and trust administration, estate and gift planning and charitable planning. A source says: *"He is a very strong lawyer, technically capable and generous with his time as far as speaking engagements."* Another adds: *"He is always pleasant and good to work with, I like him."*

Lawrence Heller of Greenberg Traurig advises high net worth individuals, families and charitable organisations on domestic and international income tax planning and succession planning. *"I think of Larry as being in the international space,"* an interviewee comments, adding that *"his knowledge and experience really stands out"* in that area, and that *"if I were to bring him in, it would be for a super-technical international matter."*

Theodore Hellman of Hanson Bridgett LLP is known for his work assisting high net worth individuals with estate planning, trust administration and charitable giving. Hellman is considered to be *"a very well-known lawyer, extremely capable and very highly regarded."* One source says: *"I think he is great, we work together well; he is a good negotiator and a lovely individual."*

Paul Gordon Hoffman of Hoffman, Sabban & Watenmaker, APC *"is a strong lawyer and a big fixture in the Los Angeles trust and estate community,"* a commentator remarks. One source describes him as *"collaborative, friendly, warm and he wants to work things out,"* while another says he is *"a real scholar – he has a really fine mind and an even disposition."*

Jennifer Jordan McCall (see p.491) of Pillsbury Winthrop Shaw Pittman LLP advises high net worth individuals on estates, trusts and tax planning. An interviewee praises her ability to *"think strategically"* and another says she is *"extremely helpful with advice."*

George Mooradian of Baker & Hostetler LLP *"is my top recommendation,"* a source reports, adding: *"I usually say, 'If I were in your shoes, I would go to George.' George tells his clients that they need to meet a minimum once per year. Typically, people feel that once they do estate plans they don't need to update it. His tactics and genuine desire to stay in tune with clients' personal wealth and business life is what sets him apart."* Another interviewee comments: *"He understands the financial side of things in a very skilled way, he fully grasps it. He is very knowledgeable in estate planning, as well as financial modelling and consequences on the overall tax position. He is intelligent, I have a lot of trust in him."*

David Newman of Mitchell Silberberg & Knupp LLP *"is the top charitable planning guy in town – he is incredibly knowledgeable,"* an interviewee notes. Another says: *"He specialises in foundations and the non-profit area. I have had a good experience with him and found him to be knowledgeable."*

Bruce Ross of Seyfarth Shaw LLP has a *"terrific reputation nationally"* for trusts and estate disputes and a particularly *"good reputation for mediation,"* sources say. One interviewee reports that *"he does extraordinary work. He is very practical, direct, he has a wealth of knowledge and T&E litigation experience."*

Steven Trytten of Henderson Caverly Pum & Trytten LLP assists clients with tax, estate and succession planning. An interviewee notes: *"In Los Angeles he is the top pensions lawyer, he is as good as they get."* Trytten is *"a specialist in retirement planning,"* agrees another source, adding: *"He is extremely knowledgeable, the best speaker in this subject matter and very generous with his knowledge."*

Family/Matrimonial High Net Worth

Family/Matrimonial: High Net Worth
California
Leading Firms
Band 1
Walzer Melcher LLP
Wasser, Cooperman & Mandles
Band 2
Blank Rome LLP
Hanson Crawford Crum
Band 3
Hersh Mannis LLP
Jaffe Family Law Group *
Kolodny Law Group
Sideman & Bancroft LLP *
* Indicates firm with profile.
Alphabetical within each band. Band 1 is highest.

Band 1

Walzer Melcher LLP

Walzer Melcher enjoys an excellent reputation for family law services. One source regards it as a *"premier boutique family law firm"* and also mentions that it is their *"go-to"* firm.

"This is a really excellent firm that is focused on helping its clients," enthuses one interviewee, adding: *"They have a very caring approach and they are very warm."* Another states: *"I like this firm a lot. They have excellent attorneys and they do very high-end and complex work. They handle complicated cases extremely well and they are very skilled. They have a lovely team of attorneys."*

Notable practitioners

A source describes **Peter Walzer** as *"terrific,"* explaining: *"He is creative and hands-on, very active and interested in the clients. You can tell he loves what he does, the creativity and brain power comes out naturally in a very enthusiastic way."* Another source enthuses: *"I think he is an incredibly professional attorney, very responsive and very thoughtful. He thinks through all issues very carefully. He always comes to us with a very calculated question and it is clear that he is detail-oriented. He is very good at what he does."*

"I have the utmost respect for his knowledge base," one interviewee states about **Christo-**

Family/Matrimonial: High Net Worth	
California	
Senior Statespeople	
Senior Statespeople: distinguished partners	
Wasser Dennis	*Wasser, Cooperman & Mandles*
Leading Individuals	
Band 1	
Walzer Peter	*Walzer Melcher LLP*
Wasser Laura	*Wasser, Cooperman & Mandles*
Band 2	
Cooperman Bruce	*Wasser, Cooperman & Mandles*
Hanson Belinda	*Hanson Crawford Crum*
Hersh Neal Raymond	*Hersh Mannis LLP*
Jaffe Daniel J.	*Jaffe Family Law Group*
Kolodny Stephen	*Kolodny Law Group*
Mandles Melanie	*Wasser, Cooperman & Mandles*
Melcher Christopher	*Walzer Melcher LLP*
Phillips Stacy	*Blank Rome LLP*
Richmond Diana	*Sideman & Bancroft LLP*
Spiegel Lance	*Young, Spiegel & Lee LLP (ORL) ◊*
Stross Ellen	*Berra Stross & Wallacker (ORL) ◊*
Band 3	
Crum Jennifer	*Hanson Crawford Crum*
Ginsberg Larry	*Harris Ginsberg LLP (ORL) ◊*
Hersh Jill	*Hersh Family Law Practice (ORL) ◊*
Landesman Laura	*Wasser, Cooperman & Mandles*
Mannis Joseph	*Hersh Mannis LLP*
Minyard Mark E.	*Minyard Morris (ORL) ◊*
Royce Kristina	*Blank Rome LLP*
Yoda Steven	*Walzer Melcher LLP*
Band 4	
Kiley Anne	*Elkins Kalt Weintraub Reuben (ORL) ◊*
Mazzei Monica	*Sideman & Bancroft LLP*
Rice Amy	*Wasser, Cooperman & Mandles*
Ross Mindy	*Winter & Ross (ORL) ◊*
Stanley Robert W.	*Rosenfeld Meyer (ORL) ◊*
Thomas Edward J.	*Law Office of Edward J. (ORL) ◊*
Up-and-coming individuals	
Barnett Stephanie M.	*Barnett Law Group (ORL) ◊*
◊ (ORL) = Other Ranked Lawyer.	
Alphabetical within each band. Band 1 is highest.	

pher Melcher . *"He is an excellent writer, this really stands out. He is very intelligent and he can analyse issues very well,"* says another interviewee.

One source says of **Steven Yoda** : *"I have referred clients to him, my clients love him and think he is amazing. He is very active and curious, very invested. I see him as an up-and-comer, he has so much integrity."* Yoda often handles complex and high-value matrimonial law matters.

Wasser, Cooperman & Mandles

"They are phenomenal, I absolutely love them," a source enthuses about LA firm Wasser, Cooperman & Mandles, adding: *"They are brilliant for complex cases."* Another source notes: *"They have one of the premier practices for high net worth matters in the city. I think they are truly wonderful. I would recommend them."*

"They would be a go-to for family matters," an interviewee states, explaining: *"They have a lot of good attorneys that really want to assist the client through difficult times."*

Notable practitioners

Senior statesman **Dennis Wasser** is regarded as *"an icon of family law"* and *"brilliant"* by one interviewee. Wasser is a fixture of the LA divorce law scene, and over the last fifty years he has represented clients in some of the biggest cases in the state.

Laura Wasser is praised as *"brilliant, smart, talented and known to be incredibly honest and thoughtful"* by one source. One interviewee notes that she is *"settlement-minded,"* while another highlights that she is *"very smart and effective. She gets to the point and cuts through the issues. She manages clients' feelings well and she is tough when she needs to be."*

Bruce Cooperman is described as a *"talented litigator"* by one interviewee, who adds: *"I have nothing but positive things to say."* Another interviewee says Cooperman *"knows this stuff really well, he is the real star of the firm. He would be my top choice to refer work to."* A third source also praises Cooperman, saying: *"He does a very, very nice job. He is very smart, he does high-level work and sophisticated work."*

Melanie Mandles is *"a problem solver,"* a source enthuses, adding: *"She has got a positive demeanour during difficult cases and she is always looking for the solution to the problems that are presented. I find that we are good teammates, even when she is on the other side of a case."* One commentator praises Mandles as being *"a really good listener"* who *"gives good advice and good direction. She is very strong, a very calming presence and she does an effective job with pre-marital agreements."* Another notes: *"She is excellent. She does a good job at representing clients and they like working with her. I bring her in for big pre-marital agreements for a family law perspective."*

Laura Landesman is highly regarded for her pre-nuptial work, with one source saying: *"She is excellent for pre-nuptials. She is so very good, I would always recommend her to anyone high net worth."* One interviewee describes her as *"excellent, skilled and thoughtful,"* and another highlights that *"she is knowledgeable – she really knows family law well and understands the issues."*

Amy Rice assists high net worth clients in a range of family matters. *"She is very good at keeping client expectations reasonable,"* remarks a source; *"she has a good demeanour and can manage client relationships well."*

Band 2

Blank Rome LLP

Blank Rome is highly regarded in California for its family law services. *"They are a very strong family law team – they are very knowledgeable, very compassionate and they care about giving value for their services,"* a commentator states. The firm provides pre-nuptial, post-nuptial and separation agreements and also assists with divorce matters, child support and spousal support.

"One of their strengths is their teamwork and open-minded approach to litigation," remarksone interviewee, adding: *"They explore all alternatives, listen to the team of attorneys and experts on each matter, and look for early resolution when possible. When it isn't, they are completely prepared for the complex litigation that follows."* Another interviewee comments: *"The attorneys are very sophisticated and experienced. They have excellent trial skills and their paperwork is timely, well researched and to the point."*

Notable practitioners

Stacy Phillips represents high net worth individuals for family matters in California. One source comments: *"What a terrific lawyer. She is very responsive and very good at getting straight to the details. She is a diligent lawyer."* A California estate planner states: *"I refer work to Stacy quite a bit, I am impressed with her work. She is very focused, her work is very good. She gets high marks from me and my clients."* An interviewee says that they are *"extremely impressed with her – she is extremely prepared and a great advocate,"* and adds: *"She is extremely respectful, she is a good fighter and she is extremely respectful to the judge."*

Kristina Royce is an experienced family law practitioner. *"I think she is amazing with clients,"* an interviewee enthuses, adding: *"She stands out in her space, she is so empathetic and hard-working, she is all about the client and so focused. She really has an exceptional way of dealing with clients and trying to figure out how to get the case done."* Another interviewee says: *"I am very impressed with her. She is so good with negotiations and mediations, and in trial she is very prepared and a good fighter."*

Hanson Crawford Crum

Boutique firm Hanson Crawford Crum is located in Silicon Valley and San Francisco. *"Overall they are fantastic and a very good firm for family law,"* notes one interviewee. Another comments: *"They are great. They are very good lawyers and they represent wealthy people."*

Notable practitioners

Belinda Hanson has an excellent reputation in Northern California for family law. *"Belinda takes a holistic approach to cases and clients, she is a trusted adviser to the client,"* says a source, continuing: *"She deals very well with the emotional issues and looks at the broader perspectives to make sure the client has good advisers in a situation that can be emotional. She ensures her clients have support at all the levels and she hand-holds the client through difficult times."* One California estate planner notes: *"She is a very capable lawyer and handles very high-end matters. I would recommend work to her with no hesitation. She has loads of experience and I think she has a good approach to finding resolutions where possible."*

Jennifer Crum advises affluent individuals on a range of family law matters. *"She is an excellent lawyer and she has a good reputation,"* one interviewee comments. Another interviewee remarks: *"She is an exceptional lawyer and she understands the issues when working with high net worth clients, she understands the issues with the large estates."*

Band 3

Hersh Mannis LLP

Beverly Hills-based Hersh Mannis is a boutique firm that provides affluent individuals and families with a range of services including pre-nuptial and post-nuptial agreements, as well as child custody and spousal support matters. *"I think they are great,"* says one California family lawyer, adding: *"They have good, smart lawyers who are great advocates."*

Notable practitioners

Neal Raymond Hersh is praised by one source as a *"good, honourable and honest advocate for his clients. He has a phenomenal reputation and he's spicy, but always a gentleman. He is a great leader."* Another source describes Hersh as *"an excellent lawyer,"* and continues: *"He knows how to try a case, he is confident and self-assured. He knows the law back to front."*

Joseph Mannis has a good reputation for his work on high net worth family matters. *"He is really good at digging into the weeds of cases,"* one source notes, adding: *"He is good at really complicated matters and he handles complex cases well. He can keep up with the issues. He is a good learner, a quick learner, and a really good listener. He can be very tough and effective."*

Jaffe Family Law Group

See profile on p.492

Jaffe Family Law Group is a new, but familiar, name in the LA legal market for divorce work. Its principals practised for many years at the well-known firm of Jaffe and Clemens, which closed in 2019 with the retirement from private practice of founding partner Bruce Clemens.

Like its partners' former firm, Jaffe Family Law Group handles high-value dissolutions, spousal agreements and child custody matters. Its highly experienced attorneys retain their impressive standing in this market.

Notable practitioners

Daniel Jaffe is considered *"a legend"* by one source, continuing: *"He gets the highest compliments."* Another source states: *"He is strong in taking highly complex cases and settling or litigating."*

Kolodny Law Group

Kolodny is *"one of the big players in our town"* for family law, says an LA interviewee. The firm is a family law boutique, and its attorneys are highly experienced in dissolutions, child custody disputes and matters of disputed paternity.

Notable practitioners

A source describes **Stephen Kolodny** as *"formidable, a student of the law, very knowledgeable, very sophisticated and creative. He is a massive player in this game."*

Sideman & Bancroft LLP

See profile on p.493

Sideman & Bancroft is a *"very well-known group that is good at what it does,"* one interviewee remarks. The team offers high net worth clients a number of services, including pre-marital, post-marital and custody agreements.

"The firm effectively represents high net worth individuals and is in the top tier of firms doing work in San Francisco," a source notes.

Notable practitioners

Diana Richmond is regarded as an *"icon of family law,"* according to one interviewee. *"Her professional reputation is outstanding,"* says another.

Monica Mazzei advises high net worth individuals and families on a range of family matters. *"She is a very good, high-level attorney,"* says one source, continuing: *"She does large complex cases and she really understands the issues. She is effective at getting her clients good results."*

Other Ranked Lawyers

Stephanie Barnett of Barnett Law Group has experience assisting high net worth individuals with divorces and pre-marital agreements. She also has experience with support, custody and asset division matters. *"She is a good lawyer. She is very good and she has a good reputation,"* one source comments.

Larry Ginsberg of Harris Ginsberg LLP *"is phenomenal. He is very skilled, a lovely person with a lovely demeanour who is super smart and a fierce advocate for his clients. I have always had great experiences working with him and I really regard him very highly. I enjoy his company and he is the type of person that you have a case with and love to have on the other side. He gets the highest marks,"* one California family lawyer comments. Another remarks: *"He is a good lawyer. He can settle cases, good in court, a real professional. He knows the law very well."*

Jill Hersh of Hersh Family Law Practice is described as *"outstanding"* by one interviewee, who continues: *"She is such a lovely advocate for her clients and she handles complex cases very well. I am always impressed with the quality of her work."* One source states that *"she is a great lawyer. She handles difficult, complex financial cases and she always does a good job,"* and another describes her as *"very straightforward and she gives honest and approachable advice to clients. She is very practical about what works for the client."*

Anne Kiley of Elkins Kalt Weintraub Reuben Gartside LLP *"is a good lawyer. She knows how to be a professional. She is a litigator, but does not take things personally,"* an interviewee reports. One source praises her saying: *"I love her. She is amazing, she is always on my short list. Anne is a straight shooter, she is very bright and she is definitely one of the more academically minded of the bunch. She is a good speaker and she puts on programs to educate others about family law. She has a great demeanour, a good energy and she is honest as well, which I appreciate."*

Mark Minyard of Minyard Morris *"has a good reputation and he is a very strong advocate. I refer all of my work that needs a sophisticated attorney in Orange County to him,"* one commentator reveals. A source describes him as an *"excellent lawyer and an excellent businessman,"* continuing: *"He is fabulous, he really stands out as a top lawyer. He is a great advocate for his clients, knowledgeable about the law, consistently educates himself, stays up to date. He is a formidable adversary in court."*

Mindy Ross of Winter & Ross is *"known as a big-gun litigator,"* according to one interviewee. *"She is a smart lawyer,"* says one source, while another notes: *"She is terrific. She is very good and handles difficult cases very well."*

Lance Spiegel of Young, Spiegel & Lee LLP *"is a fierce advocate and he is very well regarded,"* one source says. Another source adds: *"He has a great reputation. He brings in good celebrity cases and he is a very good lawyer."*

Robert Stanley of Rosenfeld Meyer & Susman LLP *"is technically very good, but he* *is very calm and composed, which is crucial in this area,"* one interviewee remarks, continuing: *"Having a calm voice at the table is invaluable. I would recommend work to him."* Another interviewee enthuses: *"I have the highest possible compliments for him. He is essentially, in my view, a lovely balance between being an absolute gentleman and advocating for his clients without hesitation. He is a wonderful individual and I believe in his style so much that I refer work to him often. I have seen first-hand the way he analyses cases, he is a very skilled attorney."*

Ellen Stross of Berra Stross & Wallacker is *"a highly regarded, excellent litigator,"* one source states. One commentator notes: *"She is very, very bright and even-tempered. I have worked with her on pre-marital agreements and they have always been top-notch. She represents her clients very well and she is a good advocate."* Another comments: *"She is very good for divorce matters. She is very, very good and it is a pleasant experience to work alongside her."*

Edward Thomas of Law Office of Edward J. Thomas *"is really great,"* notes an interviewee, adding: *"He does good work, presents well in court, he is very put together and has excellent attention to detail. He is a big fish in a small pond."*

Accountants & Tax Advisers

Accountants & Tax Advisers	
Leading Firms	
Andersen	
Deloitte LLP	
Frank, Rimerman + Co LLP	
Holthouse Carlin & Van Trigt LLP	
Realize CPA, LLP	
Seiler LLP	
Leading Individuals	
Holthouse Philip J.	*Holthouse Carlin & Van Trigt LLP*
Vineyard Kyle M.	*Realize CPA, LLP*

Andersen

Andersen is a well-regarded firm in the California market for tax and accounting services. One source states that *"they are the best, they are a very good firm,"* explaining: *"Andersen is in this sweet spot of being able to service ultra high net worth clients in a very sophisticated way. We find that teaming up with them makes our jobs easier – we work very well together."*

Another source remarks: *"They are terrific and they have an extremely deep knowledge in different areas. They have multi-state experts, they are so helpful and they have a deep bench."* Kurt Brune is highlighted by one attorney, who says Brune has *"very good client skills and a very deep understanding of a broad range of issues that come up. He always delivers."*

Key contact:

Kurt Brune, Managing Director

Deloitte LLP

Deloitte advises high net worth individuals and families in the USA and abroad on tax and accounting matters. One interviewee says that they *"find Deloitte very good to work with,"* because *"they have the deepest bench and biggest commitment to the practice. They work well as a team and had deep expertise. They are very helpful."* Another comments: *"I would always refer work to them, they are an excellent choice for high net worth families."*

A California source notes that Barry Neal is *"technically really, really good; he has been doing this for a long time and he is one of those resources that you can go to to get answers."* Another commentator recommends Chris Campbell, saying: *"He handles a broad range of estate and tax planning, he is terrific for this and a huge asset to have."*

Key contact:

Barry Neal, Managing Director

Frank, Rimerman + Co LLP

Frank, Rimerman is a California-based accounting firm with offices in Palo Alto, San Francisco, San Jose and St. Helena. The team offers high net worth individuals and closely held businesses services including tax, estate and philanthropic planning, as well as business valuations and investment advice. One commentator says: *"They have very solid and responsive people. It is a good team that concentrates on individuals."* Another interviewee adds: *"I work with them a lot, I think they are very team-inclusive when they approach things, they can share ideas and get the best outcome for the client."*

One source describes Karen Valladao as *"very thoughtful, planning-oriented, highly responsive and collegial to work with,"* while another source identifies Michael Yates as someone they *"enjoy working with."*

Key contact:

Karen Valladao, Partner – Tax

Holthouse Carlin & Van Trigt LLP

"I have nothing but wonderful things to say" about HCVT, reports one California attorney who also describes it as *"an absolutely wonderful firm."* Another says: *"I work with them regularly, they are phenomenal for tax planning for private clients. They also have very good business management. They would be my go-to firm."*

One interviewee praises Philip Holthouse as *"excellent – top-notch,"* adding: *"He has an excellent quality of work and he is such a nice and smart person, which is quite the package."* Greggory Hutchins is recommended by another interviewee, who states: *"I know the firm well, and Hutchins works for my biggest clients – he is very creative and clients love him."*

Key contact:

Philip Holthouse, Partner

Realize CPA, LLP

Realize CPA offers high net worth individuals, closely held businesses and charitable organisations estate, gift and tax planning services. One interviewee states: *"They are great – I find them to be the best and they add a lot to the conversation."* Another interviewee comments: *"They are very detail-oriented and they are very aware of ultra high net worth issues, and clients like working with them. They have an ability to work as part of a bigger team and they are responsive."*

Kyle Vineyard is praised by sources. One notes that *"he is very measured and calm, clients really like that about him – he is very methodical,"* and another says Vineyard is *"approachable, which is needed when dealing with forms and numbers – he is easy to understand."*

Key contact:

Kyle Vineyard, Tax Partner

Seiler LLP

Seiler are recognised as a *"very good local firm"* in Northern California. The team offers high net worth individuals and families services including accounting and tax planning, charitable and philanthropic planning and wealth transfer.

One interviewee says it is *"an approachable accounting firm that wants to assist clients at a high level."* Another source notes: *"I have had good experiences with them, they know their way around the tax and financial planning arena for high net worth individuals."*

Key contact:

George Marinos, CEO and Partner

Private Banks

Private Banks
Leading Firms
City National Bank
First Republic Bank
Goldman Sachs
JPMorgan Chase & Co
Leading Individuals
Daly Jeffrey F. *Goldman Sachs*
Sanchez Laura *Goldman Sachs*
Schrauth Daniel *JPMorgan Chase & Co*

City National Bank

City National Bank offers a number of services to high net worth individuals including estate and philanthropic planning, as well as investment management. One source comments that *"they do a lot of work for entertainment folks,"* and another says: *"I think for private client service they are at the top of the food chain."*

An interviewee notes that the firm has *"excellent people,"* and another recommends Alma Banuelos, saying: *"She is head of the trust and estate department. She always finds a way to get the best solution and she is very focused and committed to her clients."*

Key contact:

Alma Banuelos, National Head of Trust and Estate Services

First Republic Bank

One source says First Republic Bank has *"abrilliant, top-notch service for clients, and clients appreciate the work that they do – their level of service and attention to detail is impeccable."* First Republic offers trust and wealth management services for HNW clients. One California-based attorney comments: *"Their trust company is one of the best in town in terms of high touch with clients, which tends to be what clients really like."* Another remarks that *"they are always client-oriented; this is a good place to go with clients."*

Kelly Johnston, president of the bank's trust company, is described as *"very, very good"* and a *"fantastic"* professional. One interviewee praises relationship manager Linnea McArt as being *"very easy to work with – she finds a way for the client to have a good experience."*

Key contact:

Kelly Johnston, President – First Republic Trust Company

Goldman Sachs

Goldman Sachs' private wealth management division assists affluent individuals and families with wealth planning and investment matters. One attorney describes them as *"terrific"* and adds: *"Their number-one asset is that they have the best private client team nationally."* Another notes that there is *"a really great planning advisory support service there, which is a big differentiator for them,"* and continues: *"They are good at anything purely investment-oriented – they excel at this."*

Many sources praise Jeffrey Daly. One interviewee says that *"Jeff Daly is very smart and creative, he is so easy to work with. I have never met a client that did not love him,"* and another remarks: *"Jeff Daly is a fantastic wealth adviser, an in-house expert. He is phenomenal and probably the best in town."* A further interviewee comments: *"For me, Laura Sanchez is the best private banker in the business. So many private bankers are only thinking about the investment activity, she more than anyone is the true quarterback – she looks ahead, co-ordinates with the tax advisers to convene with the client to prepare and she co-ordinates with us all along. She is truly client-focused and delivers the best service I have seen."*

Key contacts:

Jeffrey Daly, Managing Director

Laura Sanchez, Managing Director

JPMorgan Chase & Co

If J.P. Morgan *"aren't at the top, they are near it,"* states an interviewee, explaining: *"They cover the waterfront very well and they are a gold standard firm. They have a good breadth and they are a go-to firm for Delaware trusts."* One source comments: *"I think they are terrific, they are excellent for clients. I find them extremely creative and responsive."*

A California trusts attorney states that private banker Daniel Schrauth *"is very knowledgeable and good at tax planning. He understands how to partner together effectively and how to educate the client so that someone like me can truly focus on the big-picture decisions and legal questions. He is good at integrating information and he can move the ball forward. He is very creative and thoughtful, as well as an intelligent planner."*

Key contact:

Daniel Schrauth, Private Banker and Wealth Advisor

Wealth Managers

Wealth Managers
Leading Firms
Bessemer Trust
BNY Mellon Wealth Management
Northern Trust
Leading Individuals
Hayes Philip J. *Bessemer Trust*

Bessemer Trust

Bessemer Trust is highly regarded in the California market for its wealth management offering. One source comments: *"They are great, I work with them for trust matters. Their strength is their national presence, they have a strong investment team and they are good at trust and estate matters. It is rare to have strong investment and trust services together."* Another commentator says: *"I find them so incredibly easy to deal with, they have a lot of in-house folks that focus on planning. They are reasonably small and tight-knit, which means there is a small ratio of client to adviser, so there is a more hands-on approach."*

One interviewee remarks: *"I think highly of them. They take on difficult matters and handle them effectively, they are really good at administration. They do not shy away from stressful and difficult issues."* This interviewee also recommends Laura Zeigler, stating: *"I have seen her work with clients and she does an exceptional job, clients enjoy working with her. Her strength is in litigation and controversy."* Philip Hayes is also recognised as an *"excellent individual"* and described as *"really smart and really good."*

Key contact:

Philip Hayes, Managing Director and Senior Fiduciary Counsel

BNY Mellon Wealth Management

BNY Mellon offers wealth management services to affluent individuals and families. *"I do a lot of work with them and they have a national reputation as a solid bank,"* one interviewee comments, adding: *"They make people comfortable."* Another commentator says: *"We have worked with them quite closely and I think they are very good – they stand out to me. They have a set of services where they will act as a quasi-family office, which I think is a* *nice offering."*

One source notes: *"Some of their financial advisers are the best of the best."* Leigh Wasson in particular is described by one source as *"responsive and really hands-on."*

Key contact:

Robert Kricena, Regional President – Northwest USA

Northern Trust

Northern Trust is highly respected in California for its wealth management services. One source enthuses that *"they are brilliant, very well respected – we have lots of clients here,"* continuing: *"They are a very thoughtful group, they take the trust business very seriously, they are a credit to this industry. They are very good trustees, I am super impressed with how they have handled questions and requests from beneficiaries. I would always go to them, they exercise the trustee function excellently."* An interviewee comments: *"They are excellent, I like their approach and I think one of the things that impresses me is that their trust officers have longevity there – you know who you will get whereas a lot of others can be a revolving door. They have a good depth of knowledge. They are at the top."* Another commentator notes: *"They are very high touch, very hands-on with the clients, very focused. Clients love working with them, and they have a pretty good group of folks both nationally and locally."*

Key contact:

Tim Geraghty, Northern California Region President

Leaders' Profiles in California

FEINMAN, Abby L.T.
Katten, Los Angeles
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abby.feinman@kattenlaw.com

Featured in Private Wealth Law (California: Southern)

Practice Areas: For high-net-worth individuals with interests on both coasts and around the globe, Abby Feinman acts as a trusted counsel for all their estate, trust and tax-planning needs. She puts advanced creative strategies to use in advising clients on wealth transfer, administering trusts and estates after death and resolving disputes over trusts and estates. She has extensive experience with philanthropic and charitable giving. Abby's clients include family offices, owners of closely held businesses, private equity fund managers, real estate entrepreneurs, art collectors, entertainment executives and corporate fiduciaries. She has extensive experience with specific issues, such as multi-generational transfers, tax-efficient wealth transfers and cross-border concerns, that arise in helping these clients meet their business and personal goals. Abby also advises clients on charitable giving and the formation of private foundations.

GRAHAM, Michelle B
Withers Bergman LLP, Rancho Santa Fe
858.400.1307
mgraham@mckennalong.com

Featured in Private Wealth Law (California: Southern)

Practice Areas: Based in the firm's San Diego office, Michelle is a partner in the private client and tax team at Withers and a member of the firm's board of directors. Her practice focuses on estate planning and tax planning strategies for both domestic and international clients. She has considerable experience in advising both US and non-US clients on tax planning matters, including planning and implementing strategies to minimize global taxation and IRS compliance with regard to foreign reporting. Michelle advises non-US individuals around the world on investing in the United States, as well as advising US individuals residing outside of the country on their US tax filings and global estate planning. Her cross-border experience includes work in Latin America, Asia, Europe, Australia, Canada and the Middle East. Michelle has done a substantial amount of work for migrating clients, including corporate executives moving from state to state and abroad and those choosing to retire or have a second home in California. Michelle also advises on sophisticated planning issues for family businesses, including structuring and implementing intra-family sales, buy-sell agreements and family business succession planning.

JOHNSTON, Carol A.
Katten, Los Angeles
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Featured in Private Wealth Law (USA), Private Wealth Law (California: Southern)

See under USA Nationwide for profile.

LARSON, Genevieve
Withers Bergman LLP, San Francisco
genevieve.larson@withersworldwide.com

Featured in Private Wealth Law (California: Northern)

Practice Areas: Genevieve Larsen is a partner in the private client and tax team at Withers and office managing director of the firm's San Francisco office. She counsels high net worth individuals on estate planning, privacy planning, business succession planning, philanthropy and probate and trust administration. She implements plans tailored to meet client objectives, whether to mitigate transfer or income taxes or limit risk of loss, through various trust structures. In addition, her experience includes guiding fiduciaries through all aspects of probate and trust administration, including settlement of disputes and probate litigation. Genevieve also counsels and assists clients with their philanthropic endeavors, through the establishment of tax-exempt organizations, charitable trust structures or donor advised funds. She also advises public charities and private foundations on best practices in governance and operations, fundraising and tax compliance. Genevieve's client roster includes technology company founders and executives, female entrepreneurs, family businesses and owners, fund managers and investment professionals.She provides clients with business and tax advice structured specifically to the markets in which they are active.

MCCALL, Jennifer Jordan
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jmccall@pillsburylaw.com

Featured in Private Wealth Law (California: Northern)

Practice Areas: Jennifer Jordan McCall, chair of the firm's Estates, Trusts & Tax Planning practice and co-leader of the Private Wealth practice, is a leading authority on U.S. and international gift and estate planning. Jenny crafts tax-savings business succession and estate transfer plans that preserve wealth and enhance family relationships. Her clients include internationally renowned museums and corporations, charities, foundations, high net worth families and individuals, fiduciaries and nonprofits. Jenny's experience includes complex trust and estate administration and litigation; gift and generation-skipping transfer taxes; spousal rights of election and rights of adopted children; endowments; and tax aspects related to disposition of corporate holdings and financial transactions. She is based in the Silicon Valley, New York and Palm Beach offices and is admitted to practice law in California, Florida and New York.

SCZUDLO, Paul
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Featured in Private Wealth Law (California: Southern)

Practice Areas: Paul Sczudlo is an international tax attorney, of counsel to the global law firm of Withers Bergman LLP, in its Century City, Los Angeles Office. He has over 35 years' experience focused on global planning matters. Paul is widely recognized for his practice in cross-border and entertainment tax planning. His clients have ranged broadly from high-net-worth individuals; foreign investors in U.S. real estate and other U.S.-situated assets; Americans with offshore investments, acquisitions and business activities; and actors, musicians, writers, producers, directors and agents; to film production and distribution companies; public and closely-held businesses; and financial institutions. Paul's practice emphasizes entertainment taxation; international income taxation; international estate and gift tax planning; international estate administration; international wealth transfer planning; other international planning for high-net-worth individuals; inbound planning for businesses seeking to set up, acquire or dispose of, manufacturing, distribution, licensing or other operations in the United States; outbound planning for U.S. businesses establishing or acquiring foreign operations; international tax withholding; and cross-border tax reporting, compliance and controversy issues. Paul received his BA and JD from Yale University and University of California, Berkeley (he studied for his final year at Harvard Law School).

JAFFE FAMILY LAW GROUP

www.jaffeflg.com **tel:** +1 310 550 7477 **fax:** +1 310 271 8313

Managing Partners: Daniel J Jaffe
Number of partners: 3 Number of other lawyers: 7
Languages: *English, Hebrew, Hungarian*

Firm Overview:
Dan Jaffe and his legal team have been at the forefront of California family law since 1977. In addition to handling the most complex family law matters for an elite clientele, the firm has been influential in shaping family law through published appellate cases and leadership involvement in the statewide, national and international family law communities.

Main Areas of Practice:
- Divorce
- Division of Property & Debts
- Protection of Property
- Child Support
- Child Custody & Visitation
- Divorce Taxation
- Preputial, Postnuptial & Cohabitation Agreements
- Paternity/Parentage
- Mediation & Litigation Before Privacy Judges
- Domestic Partnerships, Civil Unions & Same Sex Marriages
- Domestic Violence & Retraining Orders

PRACTICE AREAS
Family Law

OFFICES

USA

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Fax. 310 271 8313

SIDEMAN & BANCROFT LLP

www.sideman.com **tel:** +1 415 392 1960 **fax:** +1 415 392 0827 **email:** info@sideman.com

Managing Partner: Jeffrey C Hallam
Executive Committee: Jeffrey C Hallam, Kelly P McCarthy and Hilary C Pierce
Number of partners: 22 Number of lawyers: 39
Languages: *English, French, Italian, Spanish, Tagalog, Khmer, German, ASL*

PRACTICE AREAS

Alternative Dispute Resolution Services
Brand Integrity & Innovation Group
Business
Compliance & Corporate Governance
Criminal Defence
Estate Planning
Family Law
Intellectual Property
Litigation & Appeals
Tax

OFFICES

USA

CALIFORNIA: One Embarcadero Center, 22nd Floor, San Francisco, CA 94111
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Firm Overview:

Sideman & Bancroft was founded in San Francisco in 1978 with an initial focus on business crimes defence and criminal tax and civil tax controversy. Over the years, the firm expanded its practice areas by adding complementary practices. Today, the firm is majority women-owned practising in ten practice areas that represent high net worth individuals and families as well as businesses and entrepreneurs.

Main Areas of Practice:

The private client practice group advises individuals, families and fiduciaries on their legal affairs. The practice understands that families have unique circumstances, and its clients rely on the firm as they experience successes and challenges, including the unexpected twists and turns that life often brings. It brings together lawyers with years of experience in the fields needed to provide an integrated, interdisciplinary focus on those matters that have the greatest personal impact on its clients.

Estate & Wealth Transfer Planning:

Attorneys represent individuals, spouses and families in comprehensive estate and wealth transfer planning matters. Sideman & Bancroft advises on asset and wealth preservation and protection in which the firm tailors estate and wealth transfer plans to fit each client's goals, risk-appetite, and circumstances. Attorneys also advise on intra-family communication and relationship issues affecting planning; tax-efficient gift planning; philanthropic planning; planning for life insurance; planning for disability; creating and advising private foundations, public charities and other tax-exempt organisations; and creating all forms of charitable and non-charitable trusts, wills, family partnerships, limited liability companies and corporations, powers of attorney and other gift and estate planning vehicles. Expertise includes advising on designing succession plans for family owned businesses; advising clients on the choice of entity, structure and capitalisation of new entities; selling to create liquidity; compensating and rewarding non-family employees; advising on plane and yacht acquisition and holding entities; and advising about art and other collectibles.

Trust & Estate Administration & Controversies:

The firm represents individual and corporate trustees, executors, and other fiduciaries in handling the administration of the assets over which they have fiduciary responsibility. Expertise includes: administration of trusts and estates; federal and state income and transfer taxation of trusts, estates and beneficiaries; preparation of estate and generation-skipping transfer tax returns; managing complex financial matters; representing fiduciaries in probate court; and advising about cross-border estate matters. The firm represents fiduciaries, beneficiaries and other interested parties in all forms of controversies concerning trusts and estates. Its expertise includes privately negotiating settlements with beneficiaries, including using mediation and arbitration; representing clients in the probate court and handling will contests and other civil litigation on behalf of fiduciaries, beneficiaries and other interested parties.

Tax Planning & Controversies:

The firm advises individuals and fiduciaries regarding the minimisation of federal, state and local taxes. Its expertise includes federal and state individual income taxation; federal and state estate, gift and generation-skipping transfer taxes; state and local taxation, including sales and property taxes; tax-exempt organisations; foreign bank and accounts reporting (FBAR) requirements and California income taxes impacting trusts and estates in and out of California. The firm is nationally recognised for its expertise in resolving complex tax disputes. Many of its attorneys who handle these matters served as federal prosecutors prior to joining the firm. Expertise includes tax compliance; federal and state audits; lien, levy and collection matters; federal and state administrative proceedings; and litigating civil and criminal tax disputes in all federal and state courts.

International Tax Planning:

The international tax planning practice includes expertise on the impact of US and foreign taxation on individuals and families with connections across international borders. Its expertise includes planning to reduce taxation on cross-border investments for US and foreign clients; using income and transfer tax treaties to advantage; tax sensitive trust and estate planning for US persons with foreign assets; tax efficient estate planning for foreign and multinational families, coordinating with international counsel; and pre-US residency tax planning.

Family Law:

The firm is recognised for its skill in handling complex marital dissolution matters, and particularly its innovative and constructive problem-solving approach. The family law partner is a California Certified Family Law Specialist and specialises in high net worth marital estates involving complicated valuation and financial issues including stock options, private equity, venture funds, hedge funds and privately and publicly held businesses. The family law group handles cases involving international jurisdictional issues. They are uniquely suited to sophisticated clients. Attorneys collaborate with partners in other disciplines within the firm, taking a comprehensive approach to the complex financial and emotional issues facing clients during what can be challenging transitions. Through negotiation, mediation and, when necessary, litigation, they represent clients in family matters that often demand expertise in trust and estate planning, taxes, real estate, and complex business transactions. They also represent clients in marital agreements, including cohabitation agreements, pre-marital agreements and post-marital agreements.

Firm Contacts:

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Email: ekahn@sideman.com
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WEINSTOCK MANION

www.weinstocklaw.com **tel:** +310 553 8844 **fax:** +310 553 5165

Managing Partner: Sussan H Shore
Number of partners: 10 Number of lawyers: 19

PRACTICE AREAS

Business Succession Planning
Charitable Planning & Family Foundations
Estate Planning
Estate & Trust Administration
Estate & Trust Litigation
Private Wealth Law
Tax
Wealth Management
Wills, Trusts & Tax
Wealth Transfer Planning

OFFICES

USA

LOS ANGELES: 1875 Century Park E #2000, CA 90067
Tel: +310 553 8844
Fax: +310 553 5165

Firm Overview:

For 60 years, Weinstock Manion has provided personalised, high quality services in estate planning. The breadth of services the firm offers has been carefully refined over many decades to cover the full spectrum of clients' estate planning, estate and trust administration, and estate and trust litigation needs. As a result, relationships with clients that may begin with the goal of transferring wealth in a tax advantageous manner, or resolving a dispute among beneficiaries, often last for generations.

Clients and their trusted advisors depend on this team of specialised attorneys and paralegals to implement creative and practical solutions to complex issues. Whether addressing wealth transfer and preservation, business succession planning, charitable planning, estate or trust administration, or litigation, the firm always remains sensitive to client needs.

Main Areas of Practice:

Estate Planning:
8 partners; 6 associates based in Los Angeles/ United States

Weinstock Manion is synonymous with personalised, quality estate planning services. For over 60 years, the experienced attorneys have focused on the estate planning and wealth transfer needs of moderate to high net worth individuals, business owners, real estate investors and their families. Clients concerned about their legacies and wealth preservation choose the firm because of its compassionate and exceptional service. The firm often ends up representing families across several generations as a result of the close relationships it develops, and the quality of the firm's work.

Estate & Trust Administration:
8 partners; 7 associates based in Los Angeles/ United States

The administration of an estate or trust requires careful planning. Many decisions with substantial financial implications, difficult at any time, must be made during a period of mourning. For 60 years, clients have turned to Weinstock Manion to manage their loved ones' estate and trust administration. The firm efficiently handles clients' needs with compassion, freeing them to focus on their families and personal healing. In fact, the firm's highly sensitive approach to communication and its extensive experience often causes clients to rely on the firm to handle personal matters beyond the legal issues in their time of grieving.

Estate & Trust Litigation:
2 partners; 3 associates based in Los Angeles/ United States

Legal disputes of any type are stressful. Estate and trust disputes often are complicated by grief, confusion and other strong emotions, adversely affecting the parties' ability to achieve resolution. For decades, Weinstock Manion's litigators have been representing both fiduciaries and beneficiaries in estate and trust disputes. The firm is very sensitive to the issues facing the parties, and the fact that family members often do not agree, particularly when substantial estates are involved.

Business Succession Planning:
8 partners; 4 associates based in Los Angeles/ United States

At Weinstock Manion, financial security for many of its clients is dependent upon the continued success of their closely-held businesses. Ensuring the future of their business through a well-structured succession plan is an essential component of their estate plan, and is critical to their peace of mind. The team of transactional, estate planning and tax attorneys collaborates with clients and their trusted financial advisors to plan for retirement, management transition and liquidity events, as well as unpredictable circumstances, such as incapacity or death. Throughout the process, the firm considers clients' projected wealth, multi-generational issues and estate planning goals.

Charitable Planning & Family Foundations:
8 partners; 4 associates based in Los Angeles/ United States

Supporting charitable causes is important for many of its clients. At Weinstock Manion, the firm helps clients donate to the causes they are passionate about in a tax-efficient manner through thoughtful charitable planning and family foundations. Effective charitable planning not only fulfills the personal desire to support worthy causes, it can also generate large income, estate or gift tax deductions.

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