Regarded as “spectacular” and “incredibly focused on service,” Pillsbury’s Estates, Trusts & Tax Planning practice is ranked nationally by *Chambers USA*, *The Legal 500* and *U.S. News & World Report/Best Lawyers*, which recognized our firm as Trusts & Estates “Law Firm of the Year.”

Pillsbury’s Estates, Trusts & Tax Planning (ETTP) team advises individuals, families, family-owned businesses and charitable foundations in the planning and administration of complex trusts and estates, and in U.S. and international estate, trust and tax planning. Our ETTP lawyers develop cutting-edge, customized transfer tax and estate plans, utilizing trusts, wills, various entity structures, such as partnerships and LLCs, and domestic and cross-border plans, to preserve and enhance our clients’ wealth for current and future generations. Serving clients globally, we maintain a strong bicoastal presence in the U.S., particularly in San Francisco, Silicon Valley, Los Angeles, New York, Washington, DC and Palm Beach, Fla.

Highly regarded for a deep sense of caring, attention to detail, extensive experience and knowledge of estate, trust and tax laws, Pillsbury’s ETTP lawyers listen closely to clients to understand their needs and provide sophisticated advice and well-crafted estate and trust plans to accomplish their goals. We prepare plans designed to minimize transfer and income taxes, take advantage of planning opportunities occasioned by tax law changes and withstand third-party attacks. We have achieved massive transfer and income tax savings, enabling the efficient transfer of extremely valuable and appreciating assets for the benefit of younger generations.

- Estate and trust planning and administration
- Wills and probate
- Lifetime wealth preservation and planning
  - Estate succession
  - Gift transfers
  - Charitable giving
  - International tax advice and planning for cross-border investments
- Business succession planning
- Multi-generational family issues
- Corporate fiduciaries, fiduciary duties and administration issues
- U.S. and international tax planning
- Trusts & trust administration
  - Long-term trusts
  - Generation-skipping tax-exempt trusts
  - Revocable trusts
  - Grantor trusts
  - Irrevocable trusts
  - Delaware, Alaska, California, New York and Florida trusts
- Dispute resolution
  - Surrogates Court
  - Probate Court
  - Will contests, trust disputes, fiduciary disputes

**REPRESENTATIVE EXPERIENCE**

Represented widow of highly successful investor in negotiating confidential settlement believed to be among 2014’s largest litigated estate matters. Case presented novel, complex conflicts of law, state taxation and multistate residence issues.

Serving as trustee of approximately 30 family trusts valued in the hundreds of millions of dollars for multiple branches of a family, handle competing interests, provide long-term planning advice and negotiate resolution to conflicts while avoiding litigation.

Represented hedge fund and private equity investors in establishing trusts to benefit children and future...
generations—entirely transfer-tax exempt—and save clients’ families hundreds of millions of dollars in transfer and income taxes.

- Serving as co-trustee of ongoing trusts and charitable foundation created by widow of community and business leader with extremely substantial assets and providing strategic advice on matters involving cultural institutions and long-range tax planning.

- Won unanimous decision by California’s State Board of Equalization completely abating proposed $10 million assessment against husband and wife clients in a case involving complex residency and source-of-income issues.

PRACTICE AREA HIGHLIGHTS


Pillsbury’s ETTP practice was ranked Tier 1 by U.S. News & World Report/Best Lawyers in 2015 and our ETTP lawyers have ranked annually since 2006.

Team members are recognized by The Legal 500 U.S. and most of our ETTP partners are peer-selected members of the prestigious American College of Trust and Estate Counsel (ACTEC).