

Gary D. Rothstein

Shareholder



San Francisco

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EXPERIENCE

Gary Rothstein is a shareholder in the Firm's Trust & Estates group.

Gary's practice has focused on trust administration, probate matters, and estate planning since 1993. A significant portion of his practice consists of representing corporate and individual fiduciaries and beneficiaries in all aspects of trust administration, ranging from initial funding of trusts to representing clients in Probate Court, in connection with disputes between fiduciaries, beneficiaries and creditors. Gary counsels numerous fiduciaries, beneficiaries and creditors through all phases of contested and uncontested probate and trust administration proceedings in Northern and Southern California Probate Courts, including prosecution of will and trust contests, and preparation and arguing of petitions for instructions, petitions for construction of trusts, and petitions for termination of trusts.

Another substantial portion of Gary's practice consists of representing and advising individuals and families with respect to their Estate Planning. Gary counsels clients in connection with estate, gift, and generation-skipping transfer tax issues relevant to advanced estate planning techniques, such as revocable and irrevocable trusts, GRAT's, defective grantor trusts, family limited partnerships, charitable giving vehicles, QPRT's, and life insurance trusts.

Gary gives presentations to numerous banks, trust companies, and professional associations with respect to risk management issues relevant to trust and estate administration. He also gives legal professionals and prospective donors presentations to non-profit organizations pertaining to Trust & Estate administration and Estate Planning issues.

Gary was selected for inclusion in the *Best Lawyers in America*® for 2016-2021 in the area of Trust and Estates Litigation.

SPEAKING PRESENTATIONS

PRACTICE AREAS

Trusts & Estates

BAR ADMISSIONS

California

EDUCATION

J.D., Santa Clara University
School of Law, 1983

B.A., *with honors*, San Diego
State University, 1979

- **Speaker**, “Here Today, Gone Tomorrow: A Fiduciary’s Guide to Attorney-Client Privilege”, Professional Fiduciary Association of California (PFAC) Annual Conference, May 2, 2019
- **Speaker**, “Managing Risk: How to Protect Yourself in a Post-Giraldin World,” Professional Fiduciary Association of California, June 19, 2015
- **Panel Member**, “Trust and Estates 101: Trust and Estates Start to Finish”, Pincus Professional Education, August 1, 2014
- **Speaker**, “Performing Due Diligence In New Trust Intake,” Southern California Trust Officers Association, May 5, 2011
- **Speaker**, “Federal Estate Tax Repeal – Congress Allows the Estate Tax to Disappear Into the Sunset (At Least Temporarily), “ Los Angeles Estate Counselors Forum, February 18, 2010
- **Speaker**, “California’s New No Contest Clause Rules,” Marin Professional Legal and Tax Subcommittee of the San Francisco Jewish Community Federation, May 12, 2009
- **Speaker**, “California’s New No Contest Clause Rules,” Marin Professional Legal and Tax Subcommittee of the San Francisco Jewish Community Federation, May 12, 2009
- **Speaker**, “California’s New No Contest Clause Rules,” Peninsula Professional Advisor Committee of the San Francisco Jewish Community Federation, March 16, 2009
- **Speaker**, “California’s New No Contest Clause Rules,” San Francisco Jewish Community Federation, February 4, 2009

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AFFILIATIONS & AWARDS

San Francisco Estate Planning Counsel

Member

San Francisco Professional Subcommittee of the Jewish Community
Endowment Fund

Member

Leukemia and Lymphoma Society, Northern California Division

Past Planned Giving Committee Member

Awards

Best Lawyers in America ® 2016-2021, Litigation – Trust and Estates

Northern California Super Lawyers, 2021, 2022