

PRACTICE GROUP
LEADER

Carlena L. Tapella

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SUB-PRACTICES

Estate Planning

Fiduciary Representation

Probate, Trust, &

Conservatorship

Administration

Trusts & Estates Litigation

Trusts & Estates

Mediation

ATTORNEYS

Kay U. Brooks

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Of Counsel

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Kelly E. Dankbar

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Mary deLeo

Shareholder

Danielle F. Diebert

Senior Attorney

Miranda M. Fernandez

Associate

TRUSTS AND ESTATES ATTORNEYS

Weintraub Tobin's exceptionally experienced Trusts and Estates attorneys practice throughout the Firm's Northern and Southern California offices. Many members of the Group have concentrated their practices on Trusts and Estates for more than 20 years. Our Trusts and Estates attorneys focus on clients' personal concerns as well as their estate planning, tax, and litigation goals. The top priority is to provide clients with the customized service they need and want.

Weintraub estate planners combine careful analysis and advice on the latest developments in federal and state tax policies in order to meet client objectives and maximize financial benefits in estate and personal tax planning. Our attorneys provide representation on any tax controversies that might arise, including audits and tax court proceedings. Our estate planning attorneys assist clients with retirement planning, business succession planning, asset protection, and entity formation issues.

Weintraub's Trusts and Estates Group is well-known for its probate, trust, and conservatorship administration services. Our Trusts and Estates attorneys represent beneficiaries, executors, corporate, and individual trustees in all aspects of trust administration from initial funding through Probate Court representation, if needed. Weintraub attorneys counsel beneficiaries, fiduciaries, and creditors through all phases of contested and uncontested probate administration, and if an individual cannot manage his or her affairs, our attorneys can file for and establish conservatorships as well as provide conservators with representation on an ongoing basis.

Our Trusts and Estates Group assists a broad spectrum of fiduciaries, including institutional fiduciaries, family members, and licensed professionals. Our attorneys have decades of experience representing fiduciaries with probate, trust, or conservatorship administration, from the very basic to the highly complex, including tax matters that arise during probate.



Daniel C. Kim

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Leslie R. Kolafa

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When disputes arise involving an estate plan or the administration of a probate or trust, Weintraub has a team of dedicated litigators that assist clients with a full range of trust and probate controversies. Unlike general litigators, our team has deep expertise in the Probate Code and Probate Court procedures.

In addition to representing clients in contested matters, our Trusts and Estates litigators have extensive experience with Alternative Dispute Resolution, including mediation and arbitration. This experience includes serving as mediators and arbitrators as well as representing clients in trust and estate disputes, breach of fiduciary duty claims, contested conservatorships, and elder financial abuse matters.

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