

PASD Board of Directors Application

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Why am I running? I want an increased role in the probate community as my practice now involves predominantly probate matters. I joined PASD at its inception and rejoined last year. I have consistently been impressed with the dedication of its members and the usefulness of its programs and events. I am motivated to serve on the board to increase the influence of PASD and for my own professional development.

Experience and Qualifications. I was admitted to the California Bar in 2012. I primarily drafted estate plans for clients under the estate tax exemption. I represented trustees in trust administrations for trusts of modest and substantial assets up to \$10M. I helped clients with allocation and funding issues in A/B Trusts. I have primarily practiced in the probate field since early 2016 and have represented clients in estate administrations, conservatorships, guardianships, and other matters arising in probate court since that time. I have significant experience with bankruptcy law, and have counseled clients on inheritance issues with beneficiaries with creditor issues outside of and involving bankruptcy.

I served as Secretary of a small 501(c)(7) recreational hockey league (~120 members) for over two years. I am reasonably familiar with quickbooks and have experience with bookkeeping as applied to small exempt entities.

I am very eager and willing to serve on the board of PASD.

9/29/17 