

Advanced Estate Planning in the Bay Area -- Who's Got the Chops?

By Janet Brewer on Fri, May 27, 2011



Who really has the chops to help you with [advanced planning for a high net worth estate](#)... and how can you really tell beforehand? A new guide I'll release next week has in depth answers - here is an excerpt:

Many people would rather not think about estate planning, especially those with estates worth millions of dollars. (Note: Silicon Valley area homeowners may be richer than they think they are, and especially need help with [wealth preservation](#).)

It seems like it will take a lot of effort, a lot of difficult decisions -- and who knows [what kind of legal work](#) is needed to make your plan hold up when you aren't around to explain what you really wanted?

On the other hand, your estate plan involves *everything you own* and, more importantly, *everyone you love*. You can't leave anything to chance. And there are no do-overs if it turns out the plan does not work.

The right [estate planning attorney](#) can smooth out those imposing twists and bumps in the road. You stay in the driver's seat, of course. It's [your wealth](#) that you are protecting, and only you can say how you want it to be distributed some day. But nothing beats a good navigation system when you are driving into unfamiliar territory.

Fine, but how to choose?

So: How do you find an attorney who's got the chops for advanced estate planning? Next week you can download a new guide with thorough answers to that question -- in the meantime, here are the basic qualities to look for:

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<http://www.calprobate.com/blog/>

Education

You need someone who has learned about finance as well as law. Make sure they understand the use of [family limited partnerships](#) and the many different types of trusts available.

Experience

Any attorney can call himself an estate planner, even if he has no qualifications or experience in estate planning. Look for an attorney with at least 7 to 10 years of [experience in estate planning, probate, and trust law](#). Also make sure that the attorney has experience with [high net worth clients](#). If your estate involves [international holdings or a non-citizen](#) family member, seek out someone with experience in those areas, too.

Dedication

An attorney simply cannot handle divorces, traffic tickets, and other matters and still be an estate planning expert, too. Estate planning is a complicated and sophisticated area of legal practice. The attorney you choose should be devoted to this area of law full time.

Personal involvement

Beware when someone tries to hand you an off-the-shelf plan that only requires filling in some blanks. Your estate plan should be crafted for your unique circumstances.

You need an attorney who will listen, and who can explain the law clearly. Attorneys used to be called “counselors at law,” and the counseling aspect is still important. You want someone who can help you figure out [who should be your trustee](#), [who should make health decisions](#), how to untangle the complex relationships of [children from prior marriages](#), and more. [Business ownership](#) and immigration status require even more important decisions. You won't get much help from a one-size-fits-all stack of forms.

Credibility

If other people and independent organizations have dealt with the attorney and given approval, you can have a much higher level of trust. It's been my mission for over 20 years to deliver all of the above and more (see my [bio](#) for details).

Listening skills

Can the attorney you're working with actually listen? It's an essential skill.

I listen. My goal is to create the plan that effectively carries out your wishes. The more I understand about your circumstances, the better I can educate you about your choices and guide you so that

your family members won't need to [make stressful decisions in trying times](#). You will have the peace of mind of knowing that you have "done right" by your family.

Ability to explain in plain language

Some attorneys speak [legalese](#) -- making it hard to grasp the issues or choices (if this sounds familiar, follow the link for definitions of that jargon you're hearing). I provide common sense solutions and avoid legal jargon where possible. I don't expect you to be experts in estate planning, and I don't talk down to you if you aren't.

Next steps

If you are ready to [retain a Bay Area estate planning attorney](#), please [Get Started](#) here at this site.