Danielle T. Zaragoza

PARTNER

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AREAS OF EXPERTISE

Family Wealth Planning, Taxation

Overview

Danielle Zaragoza is a member of the Family Wealth Planning Department where she represents high net worth individuals in estate planning matters and fiduciaries and beneficiaries in probate and trust administration. Danielle's practice includes counseling clients with respect to a variety of tax matters, including federal income, gift and estate taxes, and California real property taxes.

Ms. Zaragoza also assists new non-profit organizations with incorporating and obtaining federal and state tax exemptions, and advises existing public charities and private foundations regarding ongoing tax and administration issues.

Publications/Speaking

Dynasty Trusts – Chapter 13A Chapter 10 of *Drafting California Irrevocable Trusts* | California Continuing Education of the Bar (CEB) | 2016 Update Co-Author

Estate Planning with Compensatory Stock Options – Chapter 10 of *Estate Planning for Special Assets* | California Continuing Education of the Bar (CEB) | 2016 Update Co-Author

Contributor to United States – California chapter of *International Succession* (Louis Garb & John Wood, eds., Oxford University Press 4th ed. 2015)

5.4.20 / Articles

High Value Estates: Proposal For Compensating Personal Representatives For Ordinary Services In Probate Estates That Exceed $25 Million And Trustees Of High Value Administrative Trusts

Professional Activities

Ms. Zaragoza is a member of the Bar Association of San Francisco and she served as past chair of the Estate Planning, Probate and Trust Section of the Barristers Club of the Bar Association of San Francisco.

Education

University of California, San Diego
B.A., *cum laude*, 1998
University of California, Davis
School of Law (King Hall)
J.D., *Order of the Coif*, 2003
Editor, U.C. Davis Law Review

Admissions

California State Bar

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Accolades

Chambers recognized Ms. Zaragoza in 2020 as a leading California lawyer in Private Wealth Law. She has also been recognized as a Best Lawyer (2021 Edition) in Trusts and Estates by *Best Lawyers in America*.

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