

## Shartsis Friese Promotes Jao and Zaragoza to Partners in Family Wealth Planning Group

**San Francisco, February 3, 2020** – Shartsis Friese LLP is pleased to announce that [Florence Jao](#) and [Danielle Zaragoza](#) have been promoted to the partnership effective February 1, 2020.

Jao and Zaragoza represent individual and family clients in the areas of estate planning, estate and trust administration, estate and gift taxation, charitable gift planning, and probate. They also counsel new non-profit organizations with incorporating and obtaining federal and state tax exemptions, and advise existing public charities and private foundations regarding ongoing tax and administration issues.

“Danielle and Florence are outstanding lawyers who are highly valued by the clients they serve,” said Shartsis Friese founding partner [Art Shartsis](#), “Their promotions to partner caps off an exciting period of growth for the firm’s Family Wealth Planning Group, which has reinforced its reputation as one of the premier estate planning practices in Northern California.”

The Family Wealth Planning Group at Shartsis includes ten attorneys representing a wide range of high-net-worth individuals and families, including among others: executives of public corporations, owners of closely held businesses, and entrepreneurs involved in start-up businesses. Members of the group also assist individuals, families, private foundations, charitable organizations, and businesses to implement their philanthropic goals, representing some of the largest and best known foundations in California.

“Florence and Danielle are wonderful colleagues who are unusually attuned to the needs of their clients,” concluded [Patrick McCabe](#), who leads the firm’s Family Wealth Planning Group. “Their skills and technical expertise, combined with their ability to develop thoughtful and thorough solutions to complex estate planning issues, adds significant value to our team and provides great depth to the service that we provide to clients.”

Zaragoza received her J.D., *Order of the Coif*, from the University of California, Davis in 2003 where she was Editor of the *UC Davis Law Review*, and her B.A., *cum laude*, from the University of California, San Diego in 1998. Jao received her J.D., *cum laude*, from Georgetown University Law Center in 2003, and her B.A., *magna cum laude*, from Amherst College in 2000.

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### **About Shartsis Friese**

*Founded in San Francisco in 1975, Shartsis Friese LLP has more than 65 lawyers. The firm has extensive trial and business litigation experience, including securities enforcement defense, and a complex transactional practice focused on investment advisers, hedge funds, mergers and acquisitions, corporate finance, securities, tax, venture capital, intellectual property, family wealth planning, and real estate. For more information visit [www.sflaw.com](http://www.sflaw.com).*