SHARTSIS FRIESE

www.sflaw.com

Danielle T. Zaragoza

PARTNER

415-421-6500 dzaragoza@sflaw.com



Danielle T. Zaragoza advises high-net-worth individuals on estate planning matters as well as individual and professional fiduciaries in trust administration matters.

Clients seek Danielle's guidance on structuring estate plans and navigating complex post-death trust administration matters. She helps clients evaluate and implement estate plans that accomplish clients' goals in tax efficient manners

Danielle also assists new nonprofit organizations with incorporating and obtaining federal and state tax exemptions and advises existing public charities and private foundations regarding ongoing tax and administration issues.

Activities

- Bar Association of San Francisco

AREAS OF EXPERTISE

Family Wealth Planning

Charitable Planning

Trust & Estate Administration

EDUCATION

University of California, Davis, School of Law (King Hall); J.D., *Order of the Coif*, 2003

University of California, San Diego; B.A., *cum laude*, 1998

BAR ADMISSIONS

California

ACCOLADES

Ranked by *Chambers and Partners* in its High Net Worth Guide as a leading California lawyer in Private Wealth Law, 2020 – present

Recognized in *The Best Lawyers in America*®, for Trusts and Estates list, 2022 – present



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Family Wealth Planning
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