

NICOLE D. WARMERDAM

COUNSEL



Nicole D. Warmerdam counsels clients regarding a broad range of estate planning and administration matters, including drafting and implementing their estate plans, petitioning the probate court to resolve issues relating to estates and trusts, and navigating the process of administering estates and trusts after death.

In her practice, Nicole frequently advises clients regarding the minimization of gift, estate, generation-skipping and property taxes. Nicole also focuses her practice on non-tax issues affecting the planning and administration of estates and trusts, such as business succession, creditor protection, blended families, vulnerable beneficiaries and property co-ownership

PROFESSIONAL ORGANIZATIONS

- › California State Bar Estate Planning, Trust, and Probate Law Section
- › San Mateo County Bar Association, Probate and Estate Planning Section
- › Bar Association of San Francisco, Estate Planning, Probate and Trust Section
- › Peninsula Estate Planning Council
- › Provisors
- › San Mateo Chamber of Commerce, Business Referral Network and Leadership class, 2016-2017

ADMISSIONS

- › State Bar of California
- › Certified Specialist, Estate Planning, Trust and Probate Law Board of Legal Specialization

CIVIC AND CHARITABLE

- › San Mateo County Law Library Foundation

SPEAKING ENGAGEMENTS

- › “Real Property Basics for Estate Planners”, Continuing Education of the Bar, State Bar of California (May, 2017)

KEY AREAS

- Trust and Estate Planning and Administration
- Probate and Conservatorship
- Estate Tax Planning and Taxpayer Representation
- Business Succession and Wealth Transfer Planning

PRACTICE AREAS

- Wealth Transfer Planning and Administration

ACADEMIC CREDENTIALS

- J.D., University of San Diego School of Law
- B.A., University of Southern California