

DANIEL G. BROWN

DIRECTOR



Daniel Brown helps clients by successfully handling complex and simple wealth transfers, administration, and related controversies. He has been certified by the State Bar of California Board of Legal Specialization as a specialist in estate planning, trust and probate law.

ADMISSIONS

- › State Bar of California
- › United States Tax Court
- › United States District Court for the Northern District of California
- › United States District Court for the Eastern District of California
- › Certified Specialist, Estate Planning, Trust and Probate Law; State Bar of California, Board of Legal Specialization

PROFESSIONAL ORGANIZATIONS

- › Member, Executive Committee of the California State Bar Tax Section
- › Past Chair and Commissioner of the Estate Planning, Trust and Probate Law Advisory Commission, California State Bar Board of Legal Specialization
- › Member of Court-Appointed Attorney Panel for San Mateo County Superior Court Probate, Trust and Conservatorship matters
Member, California State Bar Tax Section
- › Member, California State Bar Estate Planning, Trust, and Probate Law Section
- › Member, San Mateo County Bar Association, Probate and Estate Planning Section

KEY EXPERTISE

Trust and Estate Planning and Administration

Probate and Conservatorship

Estate and Income Tax Planning and Taxpayer Representation

Employee Benefit Health and Welfare Plans, ERISA, and Related Laws

Business Succession and Wealth Transfer Planning

Corporate and Business Representation and Counseling

ACADEMIC CREDENTIALS

L.L.M., Boston University
School of Law

J.D., Santa Clara University
School of Law

B.A., California State University
at Fullerton

HONORS AND AWARDS

- › Chair and Commissioner of the Estate Planning, Trust and Probate Law Advisory Commission, California State Bar Board of Legal Specialization
- › Member of Court-Appointed Independent Attorney Panel for San Mateo County Superior Court Probate, Trust and Conservatorship Matters Member
- › Member, Bar Register of Preeminent Lawyers
- › Rated “AV” by Martindale-Hubbell; Legal Ability Rating “A”, Very High to Preeminent; General Ethical Standards Rating “V”, Very High
- › Northern California Super Lawyers recognition, 2009-2010, 2014-2016

SPEAKING ENGAGEMENTS

- › Recent Developments in Trust & Estate Law”, State Bar of California 89th Annual Meeting (October, 2016)
- › “Busting the Bypass Trust, Simplifying Irrevocable Trusts”, Barulich Dugoni Law Group MCLE, (2015)
- › “Billing Ethics and Guidelines” Barulich Dugoni Law Group MCLE, (2014)
- › “Comprehensive Estate Planning”, Cypress Lawn Heritage Foundation, June 2016
- › Special guest on the KALW-FM talk radio show “Your Legal Rights”, hosted by Chuck Finney. Mr. Brown spoke on this talk and call-in show and answered questions regarding “A further discussion of Basic Estate Planning Issues” (June 2014)
- › Special guest on the KALW-FM talk radio show “Your Legal Rights”, hosted by Chuck Finney. Mr. Brown spoke on this talk and call-in show and answered questions regarding “Basic Estate Planning Issues” (April 2014)

PUBLICATIONS

- › Co-author, “Busting the Bypass: Simplifying Irrevocable Trusts, California Trusts and Estates Quarterly,” Vol. 22, Issue 1, 2016 (May 2016)
- › Contributing author, “Inside the Mines: Family and Business Succession Planning 2015 Edition” – Chapter title “Tax Law Changes Alter Client Reasons for Seeking Estate Planning.” This book is published by Aspatore, a subsidiary of Thomson West (January 2015)