

TIM MAXIMOFF TO SPEAK ON PLANNING FOR DIGITAL ASSETS

Date 06/18/2015 and 06/19/2015
Time 11:00 a.m. to 12:00 noon
Location San Francisco and Los Angeles

Estates & Trusts attorney Tim Maximoff will speak at the CalCPA Estate and Trust Conference June 18 and 19, 2015 on the topic of "Digital Estates, Social Media & Technology."

Tim will cover the topics of:

- Planning for a client's succession, incapacity or death
- Access and distribution of digital assets and accounts
- Fiduciary responsibilities, authority and selection
- Privacy laws, ownership, terms of service and access
- Role of advisor and data security issues
- Practical issues / digital inventories

This conference is designed for CPAs, attorneys and financial professionals involved in estate and gift tax planning and compliance, along with other estate planning professionals and practitioners with high net-worth clients with interests in closely held businesses.

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Tim Maximoff counsels clients in Tax, Estate Planning and Administration, and Business Matters. In estate planning, he assists his clients in optimizing their planning, addressing the high estate and income tax burdens, and the unique family and business dynamics of each case. Tim's work encompasses the appropriate use of many types of trusts, family corporations, partnerships, limited liability companies, and foundations, as well as assisting his clients in the formation and operation of their business ventures. He assists clients in administering estates and trusts and in resolving complicated estate and family business disputes. Tim also represents individuals and business clients in federal and state tax examinations, appeals and litigation, and in trust and estate disputes.

Primary Contact

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- J. Timothy Maximoff

Hoge Fenton Jones & Appel | Offices: Pleasanton, San Jose, and San Mateo | www.hogefenton.com