HOGE · FENTON

FAMILY OFFICE SUPPORT

Trusted, Responsive Counsel for the Family Office

Family offices manage complex responsibilities that span **business interests**, **investments**, **family relationships**, and philanthropy. Hoge Fenton helps family offices anticipate legal risks, act on opportunities, and protect the wealth and legacy of the families they serve.

The firm has been recognized in **Best Law Firms®** for Family Law, Real Estate Law, Tax Law, and Trusts and Estates, reflecting experience in areas central to family office needs.

Why Family Offices Choose Hoge?Fenton

- **Strong Community Relationships.** We have deep ties across the San Francisco Bay Area's business, government, and legal communities, providing valuable connections and local insight.
- **Responsive Counsel.** Whether facing a tight closing deadline or a sensitive family matter, we identify priorities and respond promptly.
- **Direct Attorney Access.** Clients work directly with the attorneys handling their matters, supporting clear communication and timely decisions.
- **Coordinated Legal Support.** Our attorneys collaborate across practices to address interconnected business, real estate, employment, family, tax and estate matters.
- **National and International Capabilities.** Through our membership in Mackrell International, we work with independent law firms around the world to help clients address legal needs across jurisdictions.

Representative Matters

- **Expedited 1031 Exchange:** Structured a 1031 Exchange where property was sold in the San Francisco Bay Area, with replacement property purchased in Montana. The transaction was completed in less than four weeks.
- **Cross-Border Trustee Assistance**: Assisted a client nominated to serve as co-trustee of a valuable property in disrepair who was concerned about potential liability. Working with Italian co-counsel, we coordinated with the other co-trustee in Italy and facilitated a sale that resolved the client's liability concerns.
- **Real Estate Refinancing**: Assisted a family office to re-finance multiple properties in their real estate portfolio.
- **Household Employment Law Defense & Counsel**: Defended a family office in litigation brought by a caregiver. After resolving the dispute, we advised on worker classifications and employment practices for household staff, including groundskeepers, housekeepers, nannies,

and personal assistants.

- **Tax-Efficient Trust Planning:** Designed a trust with flexible tax-planning provisions. Following the client's death, analysis and implementation of those provisions saved the family millions of dollars in taxes.
- **Marvin Action Defense**: Obtained a favorable judgment defending a claim to a client's wealth arising from a nonmarital relationship.
- **Real Estate Acquisition and Financing**: Assisted a multi-generational family office based outside of California with the acquisition and financing of a multifamily residential tower to diversify its portfolio.

Beyond Estate Planning & Tax

While wills, trusts, and tax strategy remain vital, they are only the starting point. We regularly advise on:

Strategic Needs	How We Help
Business Operations & Deal Support	Entity formation, business succession planning, and transaction structuring
Real Estate	Acquisitions, sales, leasing, 1031 exchanges, construction contracts, financi
Employment	Employment agreements, incentive plans, cross?border compliance, employ
Dispute Prevention & Resolution	Pre?litigation counseling, mediation, arbitration, complex litigation

Divorce and Family Law	Marvin Actions involving nonmarital relationships, dissolution of marriages ar child custody
Trust, Estate, & Tax	Estate and tax planning, business succession planning, and trust and estate
Legacy	Foundation formation and advice on charitable compliance

Our Commitment

Family office matters often involve both financial stakes and deeply personal concerns. We bring responsive service, clear advice, and seasoned judgment to help clients make informed decisions and move forward with confidence.

Primary Contact

- Sblend A. Sblendorio
- Daniel W. Ballesteros

Related Attorneys

- J. Timothy Maximoff
- Julie Y. Wann
- Natasha M. Parrett
- Sarju A. Naran
- Lloyd A. Schmidt
- Eugene Ashley
- Darlene D. Chiang
- Dennis S. Zell
- Daniel G. Brown
- Robert A. Bleicher
- Beau Epperly