

HOGE ■ FENTON



HEATHER L. BOSHEARS

SHAREHOLDER

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OVERVIEW

Heather's practice is focused on estate planning and trust administration. Heather guides clients through the development of basic and complex estate plans presenting decisions in an understandable format and providing counsel in the decision-making process. She explains the various income and transfer taxes at play, including estate, income, and real property taxes. Heather considers her clients' personal values and circumstances and suggests strategies to help them achieve their goals.

Heather assists trustees and personal representatives in navigating the duties, responsibilities, and legal requirements of a fiduciary in administering trusts and estates. She works with clients and their advisors, including CPAs and financial advisors to comply with federal and California laws and to assess and manage risk. Heather is sensitive to the emotional aspects that arise during this time while keeping focus on the legal requirements.

Heather aims to resolve disputes outside of court. Early in her legal career, Heather volunteered in the probate division of the Superior Court of California where she drafted bench memoranda on various probate issues, prepared the daily probate calendar advising jurists, and researched and drafted statements of decision for bench trials. She has litigated matters involving accountings, breach of fiduciary duties, suspension and removal of trustees, lack of capacity, undue influence, financial elder abuse, and the validity of marriage. Before attending law school, Heather's positions included manager at PricewaterhouseCoopers, operations officer at Bank One Corporation (now J.P. Morgan), university auditor at San Francisco State University, and management consultant at Northern California Public Broadcasting, Inc. (KQED).

Heather is dedicated to animals and supports numerous organizations advancing their welfare. Outside of the office, she enjoys running and works as a dog and cat adoptions counselor.

CERTIFICATIONS

Certified Specialist in Estate Planning, Trust and Probate Law as certified by the State Bar of California Board of Legal Specialization

Certified Public Accountant (CPA), licensed in Colorado

PRACTICE AREAS

Estates and Trusts

Taxation

Nonprofit Organizations

EDUCATION

Graduate Student, Taxation, Golden Gate University, School of Law

J.D., University of San Francisco School of Law

B.S., Louisiana State University, Finance Major, Philosophy Minor, Commercial Banking Concentration



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ADMISSIONS

California

U.S. District Court, Northern District of California

U.S. Court of Appeals, Ninth Circuit

Certified Public Accountant (CPA) licensed by the State of Colorado Board of Accountancy

AWARDS

Best Lawyers: Ones to Watch in America, Trusts and Estates, 2021-2024

Northern California Super Lawyers Estate Planning & Probate "Rising Stars," 2017-2020

COMMUNITY

San Mateo County Bar Association's Estate Planning, Trust and Probate Section - Past chair

The Humane Society of the U.S. - District leader for California's 18th Congressional District

Junior League of San Jose - Past treasurer and member of the board of directors

San Francisco SPCA - Adoption counselor

SPEAKING ENGAGEMENTS/ARTICLES

- [Estate Planning for Your Pet](#), Hoge Fenton Legal Article, February 1, 2022
- *Bay Area "Quirks"*, The Bar Association of San Francisco Estate Planning, Probate and Trust Section and Estate Planning, Probate and Trust Litigation Subsection, Panelist, April 2021
- *Where There Is A Will, There Is A Way: Exploration of Will Drafting, Execution and Litigation*, Eastern Alameda County Bar Association (EACBA), Co-presenter, January 2020