

# HOGE • FENTON



## **DANIEL G. BROWN**

CHAIR – ESTATES AND TRUSTS

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### **PRACTICE OVERVIEW**

Daniel G. Brown is the chair of Hoge Fenton's Estates and Trusts Practice Group. Dan assists individuals and businesses by effectively navigating both complex and simple wealth transfers, administration, and related disputes. He takes pride in being a proactive problem solver with a proven track record of successfully representing his clients in his 38 years of experience. Dan is certified by the State Bar of California Board of Legal Specialization as a specialist in estate planning, trust, and probate law. He proudly serves clients throughout California in a wide range of legal services including:

- Estate Planning
- Estate and Trust Administration
- Estate and Income Tax Planning
- Trustee Representation
- Business Succession and Wealth Transfer Planning
- Corporate and Business Representation/Counseling

### **PRACTICE AREAS**

Estates and Trusts  
Taxation  
Business Transactions  
Corporate & Business Law

### **EDUCATION**

L.L.M. in Taxation, Boston University School of Law  
J.D., Santa Clara University School of Law  
B.A. Business Administration, concentration in Accounting, California State University at Fullerton

### **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

### **AWARDS**

- 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, 2014-2023

## **PROFESSIONAL ACTIVITIES**

- Former Chair and Commissioner of the Estate Planning, Trust and Probate/Law Advisory Commission, California State Bar Board of Legal Specialization
- Member, Tax Section of the California Lawyers Association
- Member, Estate Planning, Trust, and Probate Law Section of the California Lawyers Association
- Member, San Mateo County Bar Association, Probate and Estate Planning Section
- Member, Bar Register of Preeminent Lawyers

## **PUBLICATIONS**

- Co-Author, *Busting the Bypass: Simplifying Irrevocable Trusts*, California Trusts and Estates Quarterly, Vol. 22, Issue 1, 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*, Aspatore, a subsidiary of Thomson West, January 2015

## **SPEAKING ENGAGEMENTS**

- *Recent Developments in Trust & Estate Law*, State Bar of California 89th Annual Meeting, 2016
- *Busting the Bypass Trust, Simplifying Irrevocable Trusts*, Barulich Dugoni Law Group, 2015
- *Billing Ethics and Guidelines*, Barulich Dugoni Law Group, 2014
- *Comprehensive Estate Planning*, Cypress Lawn Heritage Foundation, June 2016
- *Your Legal Rights: Basic Estate Planning Issues*, KALW-FM talk radio, April 2014 and June 2014