

# HOGGE • FENTON



## J. TIMOTHY MAXIMOFF

SHAREHOLDER, SILICON VALLEY CHAIR – ESTATES & TRUSTS

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### PRACTICE OVERVIEW

Tim Maximoff counsels his clients in estate planning and estate and trust administration, as well as tax, business, and related matters. He focuses on practical planning that addresses his client's unique family and economic situation and goals. Tim uses over 30 years of experience to explain to clients the practical issues, complex laws, and tax rules that impact their situation and help them reach their planning goals. Where appropriate, Tim introduces his clients to more advanced planning tools that could increase benefits to his clients and their families, help reduce the tax impacts, and address his clients' concerns about asset management, preservation of assets, or beneficiaries' unique situations. Ultimately, Tim applies the most effective tools for each client's specific situation, including permanent trusts, gifts, family partnerships LLCs to hold and manage businesses and properties, and planning for charitable gifts, charitable trusts, and private foundations.

When the time comes, Tim works with his clients to administer the estates and trusts of family members and ensures the plans are implemented effectively. When the administration of an estate or trust does not go smoothly, Tim works with clients to resolve estate and family business disputes or unexpected tax or liability issues and teams with our firm's excellent trust and estate litigators in contested matters.

Some clients have tax concerns in their personal affairs, businesses, or estates. Tim works with his clients and their accountants and financial advisors in tax and business planning and, when necessary, represents individual, estate, and business clients in federal, state, and property tax audits, appeals, and litigation.

### PROFESSIONAL ACTIVITIES & AWARDS

Tim is a Fellow of the American College of Trust and Estate Counsel (ACTEC). He is also the past Chair of the Taxation Section of the State Bar of California and past president of the Santa Clara County Estate Planning Council. Tim has been named a "Northern California Super Lawyer" every year since 2000 and received the top "AV" rating from Martindale Hubble. He is a member of the Estate and Trust and Business Law Sections of the California Bar Association, the American Bar Association's Taxation, Business, and Real Property, Probate and Trust Sections, and the Santa Clara County, Santa Cruz County, and Silicon Valley Bar Associations.

- AV Preeminent® (highest level of professional excellence) Peer Review Rated: CV, BV, and AV are registered certification marks of Reed Elsevier Properties Inc., used by Martindale-Hubbell certification procedures, standards, and policies.
- Northern California Super Lawyer, Estate and Probate, 2007-2024
- Best Lawyers, Trusts and Estates, 2021-2024, San Jose
  - Trusts and Estates, "Lawyer of the Year," 2021, San Jose



## **SPEAKING ENGAGEMENTS**

Tim has spoken recently on estate planning, tax, charitable giving, and digital estate planning. He has presented at State Bar of California tax conferences and educational institutes, the Santa Clara, Santa Cruz, and Alameda County Estate Planning Councils, CalCPA conferences, Santa Clara, Contra Costa, and Silicon Valley Bar Associations, as well as other financial planning forums and professional groups. Most recently, he has spoken many times on the impact of digital assets and accounts in estate planning and estate administration, as well as on the practical impact of modern medicine and biology in estate planning.

## **PRACTICE AREAS**

Business Transactions  
Corporate & Business Law  
Estates and Trusts  
International Law  
Mergers and Acquisitions  
Nonprofit Organizations  
Taxation  
Trust and Estate Litigation

## **EDUCATION**

J.D., University of Santa Clara  
M.B.A., University of Santa Clara  
B.A. Biology, Harvard University

## **ADMISSIONS**

California  
U.S. Tax Court