

HOGGE ■ FENTON



KAREN A. MECKSTROTH

SHAREHOLDER, FIRMWIDE CHAIR – ESTATES AND TRUSTS

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PRACTICE OVERVIEW

Karen Meckstroth is an estate planning attorney who works with clients to create estate plans that address each client's unique needs. She believes that an effective plan addresses both the tax planning aspects of estate planning and the nontax aspects, taking into account the client's personal values and family dynamics.

Karen is a **Certified Specialist** in Estate Planning, Trust & Probate Law as certified by the State Bar of California Board of Legal Specialization.

Her practice focuses on estate planning, charitable planning, trust administration, and fixing out-of-date plans, including irrevocable trusts.

Karen works with clients on both fundamental planning and advanced planning (wealth preservation through gifts of partial interests, grantor retained annuity trusts, intentionally defective grantor trusts, irrevocable life insurance trusts, and charitable split interest trusts). Karen assists private foundations with formation, tax exempt status, corporate governance, termination, and compliance.

Many of Karen's clients incorporate philanthropy in their planning. Estate planning is an opportunity to give the next generation a "charitable inheritance." For some, estate planning is an opportunity to define their legacy - answering the question, "how is the world different because I passed through it?"

Karen is a frequent speaker on topics such as incorporating philanthropy in the family wealth plan, selecting and preparing successor trustees, and reforming irrevocable trusts.

PROFESSIONAL ASSOCIATIONS

Silicon Valley Bar Association
State Bar of California, Trusts and Estates Section
State Bar of California, Taxation Section

REPORTED CASES

Chen v. Franchise Tax Bd., 75 Cal. App. 4th 1110 (1998) (holding that a taxpayer need only pay the amount of tax assessed, and not interest, to maintain a suit for refund of corporate franchise taxes)

NON-PROFIT BOARDS

Board of Directors, Former Chair, Notre Dame High School San Jose
Former Board Member, Employment & Community Options (nonprofit serving adults with developmental disabilities)

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PRACTICE AREAS

Estates and Trusts

EDUCATION

J.D., University of California, Hastings College of the Law

M.A. and B.A., University of California at Berkeley

ADMISSIONS

All California state courts

U.S. Court of Appeals for the Ninth Circuit

U.S. Tax Court