
James P. Mitchell

Partner

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Details

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Jim Mitchell is certified as a specialist in estate planning, trust, and probate law by The State Bar of California Board of Legal Specialization. As chair of the Family Wealth practice group, his practice focuses on tax and estate planning, as well as trust and estate administration for individuals, families and closely held businesses. He also counsels clients on various income tax planning matters, including diversification strategies.

As a part of his Family Wealth practice, Jim works with clients to structure their financial affairs to accomplish their multigenerational wealth transfer and philanthropic objectives while minimizing tax exposure. He is adept at finding solutions for the complex issues and circumstances unique to each case.

Estate and trust administration is another major portion of Jim's practice. He represents both individual and institutional fiduciaries and assists his clients in the preparation of federal and California gift and estate tax returns and in resolving gift and estate tax controversies with the IRS and other taxing authorities.

Jim received his undergraduate degree in finance from the University of Santa Clara (1981) and his M.B.A. from Golden Gate University, San Francisco (1983). He earned his law degree with honors from the University of California, Hastings College of the Law, San Francisco in 1987, where he was elected to the Order of the Coif and the Thurston Society.

Honors & Awards

Jim is recognized as a Leading Lawyer by the Chambers High Net Worth Guide in the Private Wealth Law – Northern California category. He is listed in Best Lawyers in America in the Trusts & Estates category and as a SuperLawyer for Northern California.

Professional Activities

Jim is a member of the Taxation and Real Property, Probate and Trust Law sections of the American Bar Association. He is also a member of the Taxation and Estate Planning, Trust and Probate sections of both the California Bar Association and the Bar Association of San Francisco. He is a member of the San Francisco Estate Planning Council and the Society of Trust and Estate Practitioners (STEP), an international organization of private client/trust advisors.

Education

J.D., cum laude University of California, Hastings College of the Law (1987)

M.B.A., Golden Gate University (1983)

B.S.C., cum laude Santa Clara University (1981)