Coblentz Patch Duffy & Bass LLP

Jennifer F. Scharre

Partner

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Details

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Jennifer Scharre is a Certified Specialist in Estate Planning, Trust and Probate Law by the California Board of Legal Specialization. Jennifer's practice focuses on sophisticated wealth transfer strategies for high net worth clients, including founders, individuals at startups, and clients with large real estate portfolios. Jennifer's prior practice at a boutique trusts and estates firm makes her uniquely equipped to solve both the legal and tax issues that families face as well as the practical issues of family dynamics, succession planning, and wealth preservation.

Her estate planning practice includes working with clients to develop and execute their legacy goals including drafting estate planning and entity documents. She also represents fiduciaries and beneficiaries in all aspects of trust and estate administration including preparation of trust accountings and estate and gift tax returns. Jennifer also provides advice on property tax issues for clients with large real estate portfolios and provides strategies to limit reassessment.

Jennifer is a prolific speaker and provides informative presentations regarding estate planning, charitable giving, and special needs issues to professional organizations and her local community. She has been a Lecturer at both Santa Clara School of Law and UCSC Extension.

She serves on the Executive Committee of the Trusts and Estates Section of the California Lawyers Association and on the Board of Trustees of the Silicon Valley Bar Association (SVBA), where she is also Treasurer. Jennifer also serves on the Board of Directors of the 5 Buckets Foundation. She previously served as Executive Committee Chair and Education Co-Chair of the SVBA. Jennifer is a member of the Estate Planning, Trust and Probate Section of the State Bar of California.

Jennifer served as an extern to United States Bankruptcy Judge Arthur S. Weissbrodt (Ret.) in the United States Bankruptcy Court, Northern District of California. Jennifer earned her J.D. from Santa Clara

University School of Law in 2015. She earned her Bachelor of Accountancy from the University of San Diego in 2012, where she was on the Dean's List.

Honors & Awards

Jennifer is recognized as a Northern California Rising Star by Super Lawyers in the Estate Planning & Probate Category. She was also recognized as one of the "Top Women Faculty of 2019" by Lawline.com.

Publications & Speaking Engagements

- Jennifer is a prolific speaker and is a regular contributor to legal publications and professional organizations.

  Publications

  - Update Co-Author, Estate Planning, Chapter 4, Continuing Education of the Bar (2022)
  - Author, Post Mortem of Proposition 19: The COVID-19 of the Estate Planning World, California Trusts and Estates Quarterly, Vol. 27, Issue 3 (2021)
  - Update Co-Author, Estate Planning, Chapter 4, Continuing Education of the Bar (2021)
  - Co-Author, "Strategic Considerations Regarding Medical Record Privacy and the Deceased," CEB (2020)
  - Update Co-Author, Estate Planning, Chapter 4, Continuing Education of the Bar (2020)
  - Co-Author, "Both Attorney and Trustee: Doubling Down or a Bad Bet?," California Trusts and Estates Quarterly, Vol. 25, Issue 3 (2019)
  - Co-Author, "2018 Legislation: From Transfer on Death Deeds to Decanting, What a Year, What a Year!," California Trusts and Estates Quarterly, Vol. 25, Issue 1 (2019)
  - Co-Author, "The 'Empty Chair': How to Account for the Rights of Contingent Remainder Beneficiaries in the Event of Incapacity," California Trusts and Estate Quarterly, Vol. 24, Issue 4 (2018)
  - Co-Author, "2017 Legislation: From Planning to Partnerships, Principal and Income to Proofs of Service: a Plethora of Promulgated Principles Practitioners Must Practice Proficiently," California Trusts and Estates Quarterly, Volume 24, Issue 2 (2018)
  - Co-Author, "Don't Answer that! Spouses, Families, and Privilege," California Trusts and Estates Quarterly, Volume 23, Issue 4 (2017)

  Speaking Engagements

  - Speaker, "Will All the Real Billionaires Please Stand Up," California Lawyers Association (4/1/26)
  - Speaker, "Property Taxes: Just When You Think You've Planned For Everything," California Lawyers Association (4/22/25)
  - Speaker, "Election Years Do It Better – Trusts & Estates 2024 In Review," California NAELA Summit (3/6/25)
  - Speaker, "Planners Plan and Litigators Laugh: What a Court Will Do With Your Well Intentioned Plan," San Francisco Estate Planning Council (1/15/25)
  - Speaker, "Planners Plan and Litigators Laugh: How Will a Court Interpret Your Well Intended Plan," Bar Association of San Francisco (1/8/25)
  - Speaker, "Charitable Income Tax Deductions and Planning for 2025," Stafford webinar (12/18/24)

- Speaker, “What To Do with the Alphabet Soup of Trusts – How to Effectively Use Advanced Estate Planning Techniques for High Net Worth Clients,” East Bay Trusts & Estates Lawyers (11/15/24)
- Speaker, “Estate and Gift Tax – Current Developments with IRS and Tax Court,” California Lawyers Association (9/24/24)
- Speaker, “What To Do With All Those Schedules: Form 706 and Form 709 Tips And Tricks,” California Lawyers Association (7/9/24)
- Speaker, “Property Taxes: Just When You Think You’ve Planned For Everything,” California Lawyers Association (6/18/24)
- Speaker, “Planners Plan and Litigators Laugh: How Will a Court Interpret Your Well-Intended Plan?” 2024 Sacramento Estate Planning Council Estate Planning Forum (5/30/24)
- Speaker, “What To Do With All Those Schedules! Form 706 and Form 709,” CEB (4/22/24)
- Speaker, “Property Taxes: Just When You Think You’ve Planned For Everything,” San Mateo County Bar Association (4/18/24)
- Speaker, “Recent Developments: Better News Than Your Return to Office Policy,” California NAELA Summit (3/15/24)
- Speaker, “Don’t Worry, Not Another Proposition: California Real Property Taxation Update,” Southern California Tax and Estate Planning Forum (10/16/23)
- Panelist, “Recent Developments,” Santa Clara County Estate Planning Council (5/22/23)
- Speaker, “Proposition 19: Where Are We Now?” Tri-Valley Estate Planning Council (5/4/23)
- Speaker, “Proposition 19: The Evolution Continues…And So Do Planning Opportunities,” Sacramento Estate Planning Council (4/26/23)
- Speaker, “2022 Updates in Trusts and Estates,” California NAELA Summit (3/10/23)
- Speaker, “California Property Tax Update Now that Prop 19 is Here to Stay,” Southern California Tax & Estate Planning Forum (10/26/22)
- Speaker, “Irrevocable Trust Alphabet Soup,” Southern California Tax & Estate Planning Forum (10/26/22)
- Panelist, “The Nuts and Bolts of Conservatorship Law,” CLA (10/19/22)
- Speaker, “Irrevocable Trust Alphabet Soup,” CEB (9/12/22)
- Speaker, “So, You Finally Bought into Crypto, Now What?” Far West Roundup (8/12/22)
- Speaker, “Current Developments in Federal Estate and Gift Tax and California Trusts and Estates,” California Society of Tax Consultants Annual Conference (6/13/22)
- Panelist, “Recent Developments,” Santa Clara County Estate Planning Council (5/24/22)
- Speaker, “Property Tax and Further Planning: Proposition 19 and its Impact,” CEB (5/17/22)
- Speaker, “What to Do with All Those Schedules: Form 706 & 709,” Silicon Valley Bar Association (5/12/22)
- Panelist, “Valuation of Fractional Interests,” Norcal Appraisal Institute Spring Conference (3/3/22)
- Speaker, “Intro to Trust Alphabet Soup,” Santa Cruz Estate Planning Council (11/10/21)
- Speaker, “Proposition 19: New Guidance and Great Rewrite,” Southern California Tax & Estate Planning Forum (10/28/2021)
- Speaker, “Recent Developments in Federal Estate and Gift Tax Law and California Trusts & Estates,” California Society of Tax Consultants (9/29/2021)
- Speaker, “Intro to Trust Alphabet Soup,” Silicon Valley Bar Association (6/9/2021)
- Speaker, “Proposition 19: What We Know So Far a Change In Property Tax, Inheritance, And Retirement!” Santa Clara County Association of Realtors (3/19/2021)
- Speaker, “California Recent Developments: A Break from Vaccines, Congressional Hearings, and New Hobbies,” California NAELA Summit (3/11/2021)
- Speaker, “Property Tax: Pitfalls, Proposition 19, and Proper Future Planning,” Lawline (1/14/21)
- Speaker, “A Look Back at 2020: The Good Times, California Case and Legislative Developments,” Lawline (1/12/21)
- Speaker, “Property Taxes: Pitfalls, Practical Solutions, and Advising Clients on Pros & Cons of Prop 19,” Santa Clara County Estate Planning Council (1/5/21)

- Panelist, “PROPOSITION 19: What Property Tax Laws it Changed, and What To Do Now,” Marcum, LLP (12/17/20)
- Speaker, “Property Taxes: Pitfalls, Practical Solutions, & Advising Clients on Pros & Cons of Proposition 19,” California Lawyers Association (12/16/20)
- Speaker, “Property Taxes: Practical Solutions, and Advising Clients on Pros & Cons of Prop 19,” NAELA Southern California Chapter (12/2/20)
- Speaker, “Property Tax/Gift Tax Return,” Silicon Valley Bar Association, San Jose, CA (11/19/2020)
- Speaker, “California Estate Planning Essentials,” NBI, San Jose, CA (11/16/2020)
- Panelist, “The Guide to the Rules of Professional Conduct for Estate Planning, Trust and Probate Counsel,” Santa Cruz County Estate Planning Council, Santa Cruz, CA (11/12/2020)
- Speaker, “Property Tax: Common Misconceptions, Lurking Pitfalls, and Creative Solutions,” Sacramento County Bar Association, San Jose, CA (9/15/2020)
- Speaker, “Property Tax: Common Misconceptions, Lurking Pitfalls, and Creative Solutions,” San Mateo County Bar Association, San Jose, CA (8/20/2020)
- Speaker, “Property Tax Tips and Tricks,” New Attorney Round Table, Silicon Valley Bar Association, San Jose, CA (7/9/2020)
- Panelist, “New Trust and Estate Cases in Brave ‘Novel’ World,” Santa Clara County Estate Planning Council, Santa Clara, CA (5/18/2020)
- Speaker, “Hindsight is Always 2020: What Did We Learn in 2019,” NAELA, California NAELA Summit, San Diego, CA (3/7/2020)
- Speaker, “Property Tax and Holding Title,” CalCPA, Silicon Valley Chapter, Estate and Trust Committee, San Jose, CA (2/20/2020)
- Panelist, “The Guide to the Rules of Professional Conduct for Estate Planning, Trust and Probate Counsel,” Santa Cruz County Estate Planning Council, Santa Cruz, CA (2/11/2020)
- Panelist, “California Recent Developments: Trustees Behaving Badly, Second Chances, and Jumping the Gun,” Santa Clara County Estate Planning Council (5/13/2019)
- Speaker, “Property Tax Tips and Tricks,” New Attorney Round Table, Silicon Valley Bar Association, San Jose, CA (4/10/2019)
- Speaker, “Busing the Bypass Trust: Endless Options?” Lawline (4/4/2019)
- Speaker, “New Ethical Rules, New Tax Law, and New Cases, OH MY!” California NAELA 2018 Summit, San Francisco, CA (3/2/2019)
- Speaker, “Trusts and Estates Legislative Updates,” Lawline (2/4/2019)
- Speaker, “Trusts, Tax Returns, and the TCJA: Not Just a Tongue Twister,” CalCPA SVSJ Trusts and Estates Group San Jose, CA (1/17/2019)
- Speaker, “Charitable Trusts,” Trusts A to Z (NBI) San Jose, CA (12/12/2018)
- Speaker, “Other Trust Structures and Issues,” Trusts A to Z (NBI) San Jose, CA (12/12/2018)
- Speaker, “Legal Ethics in Estate Administration,” Estate Administration (NBI) Santa Clara, CA (11/29/2018)
- Speaker, “Business Interests in Estate Administration,” Estate Administration (NBI) Santa Clara, CA (11/29/2018)
- Speaker, “Income Tax Returns,” Estate Administration (NBI) Santa Clara, CA (11/29/2018)
- Panelist, “We’re Model Citizens Now: A Primer on California’s New Rules of Professional Conduct,” Silicon Valley Bar Association, Santa Clara, CA (11/5/2018)
- Speaker, “We’re (Almost) Model Citizens Now,” 42nd Annual Fall Program, California Lawyers Association, Trusts & Estates Section, San Francisco, CA (10/26/2018)
- Speaker, “What is a Meme?! – Ethics Rules and Social Media,” The business of a Trust & Estates Practice, California Lawyers Association, Trusts & Estates Section, San Francisco, CA (6/29/2018)
- Speaker and Panelist, “Federal Estate Tax Issues,” Santa Cruz County Estate Planning Council, Santa Cruz, CA (5/16/18)
- Speaker, “Post-Mortem Planning, Trust Administration, and Tax Hurdles,” for Probate Boot Camp (NBI), San Jose, CA (5/10/18)

  - Speaker, “Ethics,” for Probate Boot Camp (NBI) San Jose, CA (5/10/18)
  - Speaker and Panelist, “2017 Legislation Update,” California Lawyers Association, Trusts & Estates Section, Los Angeles, CA (4/18/2018)
  - Speaker, “Recent Developments,” California NAELA 2018 Summit, San Diego, CA (2/2/18)
  - Speaker, “2017 The Year of the Meme – And Some Other Fun Developments,” NAIFA (1/12/2018)
  - Speaker, “Ethics in Estate Planning,” Lawline (1/11/2018)
  - Speaker, “Special Needs Trusts and Tax Deduction with Trusts,” for Trusts: The Ultimate Guide, National Business Institute (NBI) (12/14-15/2017)
  - Speaker, “Fundamentals of Estate Planning,” Lawline (12/12/2017)
  - Panelist, “Federal Estate Tax Issues,” Silicon Valley Chapter of California Society of CPAs (11/8/2017)
  - Speaker “Income Tax Returns and Business Interests in Estate Administration,” for Estate Administration Boot Camp, National Business Institute (NBI), San Jose, CA (10/4-5/2017)

Education

- J.D., Santa Clara University School of Law (2015)

- Bachelor of Accountancy, University of San Diego (2012)