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## Philip B. Feldman

### Partner

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### Details

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Phil Feldman is one of the preeminent estate planning practitioners in the Bay Area and is the firm's senior estate planning attorney. Phil brings over 30 years of experience in designing wealth management and transfer strategies for high-net-worth families. His practice includes income, gift and estate tax planning, trust and probate administration, and philanthropy.

Phil also represents individual and institutional fiduciaries in trust and estate administration and resolution of disputes. He has represented numerous clients in controversies with the Internal Revenue Service and California tax authorities, and has appeared in most of the probate courts in the Bay Area. Phil's clients value his unique ability to provide practical and highly strategic solutions to very complex tax and estate planning goals.

After graduating with honors from Michigan State University (1977), Phil practiced as a certified public accountant at Arthur Andersen & Co. in Los Angeles. He earned his law degree from the University of California, Hastings College of the Law (1983).

### Honors & Awards

Phil is recognized as a leading lawyer by the Chambers High Net Worth guide in the Private Wealth Law – Northern California category. He was recognized by Best Lawyers as the San Francisco Litigation – Trusts & Estates "Lawyer of the Year" in 2014 and is listed annually in the Best Lawyers in America in the Trusts & Estates category. He is recognized as a Northern California Super Lawyer, and is a Martindale Hubbell AV-Rated Attorney.

### Professional Activities

Phil has served as an adjunct professor of law at the University of San Francisco School of Law, where he taught classes in Wills & Trusts and personal income taxation. He is past chair of the California Bar Association Estate and Gift Tax Committee, past member of the executive committee of the Bar Association of San Francisco Tax Section, and served as the senior probate advisor to the California Bar Association's 9/11 Victims Project.

Phil was recently appointed as a charter member of the Stewardship Committee of the Napa Valley Community Foundation, a strategic advisor to the Board of the Foundation. He is a member of the San Francisco Estate Planning Council, serves on the professional advisory committee of the Jewish Community Federation Endowment, and is Co-Chair of the Marin Community Foundation Professional Advisory Committee. Phil also serves as pro bono counsel to City Arts & Lectures. He is currently a commissioner of the Town of Tiburon's Parks, Open Space and Trails Commission and previously served for many years as an officer of the Reed Schools Foundation in Tiburon.

## Publications & Speaking Engagements

- Phil is a frequent speaker at various estate planning educational institutes and meetings. He regularly speaks at the Annual Estate & Gift Tax Conference of the State Bar of California and the California State Bar Tax Section Annual Conference. He has presented at the JCEF Tax & Estate Planning Seminar, the Annual Meeting of the American Bar Association Taxation Section, and the Annual Meeting of the California Society of Certified Public Accountants, as well as at numerous private wealth advisory firms.

## Education

J.D., University of California, Hastings College of the Law (1983)

B.A., with honors Michigan State University (1977)