



## James H. Siegel

Shareholder



siegel@scmv.com



619.685.3160



619.702.6852

Mr. Siegel is a shareholder of the firm. He is certified by the State Bar of California as a Specialist in Probate Law. Mr. Siegel's practice emphasizes estate planning, trust administration, probate administration, guardianship, and conservatorship administration.

### Practice Groups

- Estate Planning & Administration
- Estates & Trusts Litigation
- Cross-Border

### Education

Mr. Siegel received his Bachelor of Arts degree from California State University at Northridge, magna cum laude, in 1976 and his Masters of Education from the California State University at Los Angeles in 1977. He received his Juris Doctor from the University of California School of Law in 1986.

### Employment Background

Prior to joining Seltzer Caplan McMahon Vitek, Mr. Siegel was a partner in the law firm of Branton & Wilson in San Diego. Prior to attending law school, Mr. Siegel was a special education teacher, working with severely disabled infants, children and adults.

### Representative Matters

- Estate planning, including drafting wills, revocable trusts, advance health care directives, and financial powers of attorney
- Gift and estate tax planning, including drafting grantor and non-grantor irrevocable trusts, life insurance trusts, grantor retained annuity trusts, and qualified personal residence trusts
- Planning for wealth transfer by gifts or sales to irrevocable trusts and charitable split-interest trusts.
- Planning for closely held business transfer of control and transfer of economic rights
- Charitable gift planning, including outright gifts, drafting charitable split interest trusts, inter vivos, and testamentary private foundations
- Property tax planning, including parent-child exclusion transfers, spousal transfers, and transfers of real property to or from an entity
- Trust administration, including representing trustees during inter vivos trust administration and administration of a decedent's revocable trust
- Estate administration and probate proceedings, including representing executors and administrators during administration of a decedent's trust
- Estate, gift, and generation skipping tax return preparation
- Representation of trustees, executors, administrators, fiduciaries, and beneficiaries, including preparation of settlement agreements and modifications or terminations of irrevocable trusts
- Represents clients in estate, trust and conservatorship litigation
- Advise clients as to cross-border estate planning and U.S. gift and estate tax issues

## **Professional Affiliations & Admissions**

- State Bar of California
- Certified Specialist-Estate Planning, Trust and Probate Law, State Bar of California, Board of Legal Specialization
- Former San Diego County Bar Association, Estate Planning Section, Co-Chair – established training program regarding guardianship law
- North County Estate Planning Council

## **Publications & Speaking Engagements**

- Mr. Siegel is a frequent speaker on a wide range of estate planning, trust and tax issues

## **Professional Awards & Honors**

- Best Lawyers in America 2020 – Trusts & Estates
- Martindale-Hubbell AV Preeminent Rated