Jay L. Beckerman
Partner

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Education

New York University School of Law, LL.M., Taxation, 1981
University of San Diego School of Law, J.D., Cum Laude, 1974
University of California at Berkeley, B.A., 1970

Memberships

BAR ADMISSIONS
California

MEMBERSHIPS
State Bar of California
Santa Barbara County Bar Association

Jay is a Partner and a member of the Estate Planning Group. Jay works on a broad range of estate and tax related planning, from wills and revocable trusts to more complex planning involving irrevocable trusts, charitable gifts and business succession planning. Jay holds an advanced degree in taxation, and his practice includes sophisticated tax planning for the transfer of wealth. Jay enjoys literature, chess and tennis.

Representative Experience

Multiple plans involving succession planning with transfer tax stands as an integral part of the planning; Design and implementation of multi-generational trusts for large wealth families.

Community Involvement

Jay served on the Cold Spring School District Board of Trustees for ten years and for six years on the governing board of the Friendship Adult Day Care Center, a non-profit organization devoted to the care of frail elderly adults. Jay currently serves on the Planned Giving Committees for the Visiting Nurse and Hospice Care of Santa Barbara.

Practice Areas

- Estate Planning
- Charitable Gift Planning
- Integrated Wealth Transfer Planning
- Succession Planning
- Trust Administration
- Valuation Planning