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Preserving Your Legacy

Jeffrey P. Geida

Shareholder / Director

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Jeffrey Geida advises high-net worth individuals on all facets of their estate, wealth transfer and business succession planning. He also manages estate and trust administration for beneficiaries and fiduciaries.

Clients appreciate Jeff's interactive approach to understanding their wide-ranging concerns, including income, capital gains, gift and estate taxes, charitable giving and business succession matters. He then introduces creative solutions, which may include the use of family limited partnerships, limited liability companies, grantor retained annuity trusts, gifting plans, sales to intentionally defective irrevocable trusts, qualified personal residence trusts, charitable remainder trusts, charitable lead trusts and private foundations.

Jeff's experience includes advising a variety of 501(c)(3) and other tax-exempt organizations on issues including entity formation, applications for tax-exemption, operations in foreign countries and international grant-making, federal tax law compliance and charitable solicitations.

To further his ability to provide the most comprehensive solutions for his clients, Jeff earned his certification in legal specialization in Estate Planning, Trust, and Probate Law from the State Bar of California. He enjoys sharing his knowledge with other professionals in the estate planning field by teaching at UCLA Extension. Previously, he served as an Adjunct Professor at Chapman University School of Law, teaching "Federal Estate and Gift Taxation."

- Estate Planning
- Wealth Transfer Planning
- Estate and Trust Administration
- Business Succession Planning
- Charitable Planning and Family Foundations

Education

- LL.M., Taxation, New York University School of Law, New York, New York, 2000
- J.D., Pepperdine University School of Law, Malibu, California, 1999
  - » Honors: *cum laude*
- B.S., Bryant University, 1996
  - » Honors: *cum laude*

Certification

- Certified Specialist – Estate Planning, Trust, and Probate Law, The State Bar of California Board of Legal Specialization

Bar Admissions

- State Bar of California
- Massachusetts
- Rhode Island

Honors & Awards

- "Southern California Super Lawyers," **Super Lawyers®**, 2015-2016
- "Southern California Rising Stars," **Super Lawyers®**, 2009 – 2014

Professional Associations & Memberships

- California State Bar
- Beverly Hills Bar Association, Trusts and Estates Section
- Massachusetts State Bar
- Rhode Island State Bar

Teaching & Notable Speaking Engagements

- *"Advisory Team for Family Offices & High Net Worth Families,"* **Financial Planning Association Los Angeles**, October 15, 2015
- *"Planning for the Family Residence,"* Tax Planning & Charitable Giving: 2014 Professional Advisor Speaker Series, **Jewish Community Foundation**, October 1, 2014
- *Estate Planning*, **UCLA Extension**, 2011 - present
- "*Estate and Gift Taxes: Impact of the New Legislation and the Future of Estate Planning*," Tax Night, **Los Angeles County Bar Association**, June 15, 2011
- *Federal Estate and Gift Taxation*, Adjunct Professor, **Chapman University School of Law**, 2004

Publications

- "Planning with Family Limited Partnerships," co-author, Credit Suisse, June 2012
- "Seizing Wealth Transfer Opportunities in a Low Interest Rate Environment," June 23, 2008