



## Jonathan S. Forster

### Shareholder / Director

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Jonathan Forster designs and implements multi-generational estate planning strategies for high net worth families. His goal for each client is to achieve their personal, charitable and business objectives while minimizing estate taxes. Jonathan specializes in situations involving business transactions, particularly pre-liquidity event planning for sales of closely-held businesses and real estate, and business succession planning. As his client's advocate, he works closely with their corporate counsel, investment bankers and financial planners to establish transactional structures that result in the greatest benefits for his clients.

Prior to joining Weinstock Manion in 2002, Jonathan was General Counsel of an international software company. In this role, he gained tremendous insight into the business management process, particularly the value of goal-setting and shareholder objectives. Jonathan effectively applies a similar process in advising his clients, first focusing on their business and personal objectives and then clarifying a process by which to achieve their goals.

In addition to guiding business owners through major events, Jonathan shares his knowledge as an instructor of Estate Planning at UCLA Extension. He also frequently presents to lawyers and other professionals on the topics of business succession planning and pre-liquidity event planning. Jonathan has found that his role as an educator has made him a skilled communicator, effectively breaking down complex topics into everyday language.

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

### Education

- J.D., Loyola Law School, Los Angeles, California, 1995
- B.A., Economics, University of California, Los Angeles, 1992

### Bar Admissions

- State Bar of California, 1995
- U.S. District Court Central District of California, 1995
- U.S. District Court Southern District of California, 1998

### Professional Associations & Memberships

- American Bar Association: 1995 - Present
- State Bar of California: 1995 - Present
- Beverly Hills Bar Association: 1995 - Present
- Los Angeles County Bar Association: 1995 - Present

### Teaching & Notable Speaking Engagements

- *Estate Planning*, UCLA Extension, 2010 – Present
- *Pre-Liquidity Event Estate Planning and Business Succession Planning*, 2002 – Present
- *Planning in a Low Interest Rate Environment*, 2008-Present
- *Trustee Liability*, 2009 – Present

### Publications

- "Estate and Income Tax Planning for Gay Couples", co-authored with Yunna Barats, *Pride and Equality Magazine*, February, 2007
- "Medical Decision-Making and Other Legal Planning Issues for Patients", *Southern California Psychiatrist*, September, 2006

### Honors & Awards

- "The Best Lawyers in America," **Best Lawyers**, 2015-2016
- "Southern California Super Lawyers," **Super Lawyers**®, 2011 - 2016
- "Southern California Rising Stars," **Super Lawyers**®, 2005 – 2010
- "AV® Preeminent™ 5.0 / 5.0" Peer Review Rated, **Martindale-Hubbell**