



Lisa M. Burkdall

Counsel

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Lisa M. Burkdall provides sophisticated wealth transfer services for high net worth individuals and families. She specializes in multi-generational planning designed to preserve the client's values while achieving both tax and non-tax objectives. Adept at drafting complex, integrated estate plans, Lisa coordinates the disposition of assets through revocable trusts, life insurance trusts, customized beneficiary designations for retirement plans and lifetime gifting strategies, such as grantor retained annuity trusts and residence trusts. Her practice also includes the modification and reformation of irrevocable trusts to accommodate the beneficiaries' evolving needs and circumstances, while staying true to the trust creator's intent. Lisa enjoys ensuring that each plan addresses the client's unique concerns and goals, identifying potential issues early on and helping clients protect their family and assets for multiple generations.

While in law school, Lisa was a member of the Hastings Law Journal from 1993-1995, and an Associate Technical Editor from 1994-1995. She also served as an Extern to the Honorable Isabella Horton Grant, California Superior Court Probate Department, in Spring of 1995.

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

Education

- J.D., University of California Hastings College of the Law, 1995
- B.A., UCLA, 1984

Bar Admissions

- State Bar of California, 1995

Professional Associations & Memberships

- Beverly Hills Bar Association
- Los Angeles County Bar Association
 - » Trusts and Estates Section

Publications

- Automating Estate Planning Forms: A Success Story, *Probate Solutions*, 8 (3), 2004
- A Dead Man's Tale: Regulating the Right to Bequeath Sperm in California (Note), *Hastings Law Journal*, 46 (3), 1995
- Student Editor. The Black Forty Anthology: Selected Articles from the Newsletter of Land Conservation Law, *The Hyperion Society*, Spring, 1995