



Martin A. Neumann

Shareholder / Director

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Martin Neumann has been helping clients achieve their estate planning and trust administration objectives for over 30 years. His clients appreciate his patience and empathy as he helps them clarify goals for their families, loved ones and charitable causes. During this process, clients often express surprise when Martin raises extremely important issues that they previously had not considered, such as the impact of a substantial inheritance on family members who may lack experience managing wealth. By addressing these sensitive issues during the estate planning process, Martin successfully introduces tools and techniques to bring his clients peace-of-mind.

For most of his career, Martin has been a committed teacher, educating accountants, lawyers, financial planners and other professionals and clients on the nuances of estate planning and estate taxes. His students benefit from his years of practical experience, as well as his creative methods of teaching a very technical subject. Martin received the coveted "Distinguished Instructor" award from UCLA Extension, where he teaches both beginning and advanced estate planning courses.

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

Education

- J.D., UCLA School of Law, 1981
 - » UCLA-Alaska Law Review, 1980 – 1981
- B.A., University of California, Los Angeles, 1978
 - » Honors: *summa cum laude*

Bar Admissions

- U.S. Tax Court, 1984
- State Bar of California, 1981

Honors & Awards

- "The Best Lawyers in America," **Best Lawyers**, 2014-2016
- "AV® Preeminent™ 5.0 / 5.0" Peer Review Rated and Client Rating, **Martindale-Hubbell**
- "Southern California Super Lawyers," **Super Lawyers**®, 2005-2016
- "Five Star Professional – Wealth Manager – Estate Planning," Los Angeles, 2012-2014
- "Distinguished Instructor," **UCLA Extension**, 2008

Professional Associations & Memberships

- Beverly Hills Bar Association
- Los Angeles County Bar Association

Teaching Positions & Notable Speaking Engagements

- *Beginning Estate Planning*, **UCLA Extension**, 1991 - Present
- *Advanced Estate Planning*, **UCLA Extension**, 1987 - Present
- *Advanced Estate Planning Techniques*:
 - » **NYU Institute on Federal Taxation**
 - » **USC Institute on Federal Taxation**
 - » **Mid-America Tax Institute**, St. Louis
 - » **USC Trust and Estate Conference**

Publications

- *Planning an Estate: A Guidebook of Principles & Techniques*, **Thomson/Reuters West**, Fourth Edition, 1998-2011
- *Estate Freeze Techniques Outside of Chapter 14*, **New York University Institute on Federal Taxation**, 1994
- *Outright Noncharitable Gifts in CA-Will Drafting Practice*, **Continuing Education of the Bar**, Third Edition, 1992