

Margaret M. Hand
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Trust & Estates Private Practice

- Estate planning for individuals and families, including:
 - drafting revocable trusts and wills;
 - drafting irrevocable life insurance trusts, grantor-retained annuity trusts, grantor-retained uni-trusts, charitable remainder trusts;
 - family limited partnerships
- Probate and trust administration, including advising fiduciaries (trustees, executors, conservators, guardians and attorneys-in-fact) on an on-going basis.
- Conservatorships and guardianships
- Estate-related litigation, such as will contests, contested conservatorships, actions against fiduciaries for breach of fiduciary duty, defense and prosecution of elder-abuse actions (primarily financial elder-abuse).
- Mediation of probate, trust and conservatorship disputes

Published Decisions

Estate of Lensch (2009) 177 Cal. App. 4th667

Education

Boalt Hall School of Law (J.D., 1993)

University of California, San Diego (B.A. with honors, 1989)

Bar Admissions/Certifications

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

Fellow, American College of Trust and Estate Counsel (ACTEC)

Member (2004 through 2010), Executive Committee, Trusts and Estates Section, State Bar of California : Chair, Trust and Estate Administration sub-committee; Past Editor and Executive Editor, *California Trusts and Estates Quarterly*

Member: Alameda County, Contra Costa County and American Bar Associations; State Bar of California

Past Chair, Estate Planning, Trust & Probate Law Advisory Commission to the Board of Specialization, California State Bar

The Commission sets the standards for specialist certification in the area of Estate Planning, Trust and Probate Law and administers the specialist exam.

Rated AV by Martindale-Hubble

San Francisco Magazine, Top 50 Female Super Lawyers, Northern California, 2005

San Francisco Magazine, Super Lawyers, Northern California, 2006

San Francisco Magazine, Top 50 Female Super Lawyers, Northern California, 2007

San Francisco Magazine, Top 50 Female Super Lawyers, Northern California, 2008

San Francisco Magazine, Top 100 Super Lawyers, Northern California, 2009

Past Chair, Trust Committee of the Alameda County Bar Association Estate Planning Trust and Probate Law Section

Admitted in 1993 to practice before the California Supreme Court, the Northern California District of the United States District Court and the United States Court of Appeals for the Ninth Circuit

Publications

Author, Chapter 1, "Is a Conservatorship Needed?" and Chapter 5, "Starting Conservatorship Proceedings," *California Conservatorship Practice* (Continuing Education of the Bar, 2005 edition)

Author, "Making the Other Guys Pay: Attorney Fees and the Common Fund Theory," Winter 2005, *California Trusts and Estates Quarterly*, Vol. 11, Issue 4 (State Bar of California)

Author, "The Basics of Estate Planning," *California Bar Journal*, October 2005, (State Bar of California)

Author, "A Mechanism to Empty the Bypass Trust," Spring 2003, *California Trusts and Estates Quarterly*, Vol. 9, Issue 1 (State Bar of California)

Editor, Chapter 3, "Durable Powers of Attorney for Financial Management: The Fundamentals" and Chapter 4, "Durable Powers of Attorney for Financial Management: Specific Clauses and Complete Forms," *Powers of Attorney* (Continuing Education of the Bar)

Author, "The States' Right-to-Die Laws and Active Euthanasia," *Legal Reference Services Quarterly*, Vol. 12(2/3) 1992

Programs and Courses

Estate Planning, Trust & Probate Law Sections, Local Bar Associations

My Lips (and Files) Are Sealed! Or Are They?

When an Attorney and the Attorney's Files Become Evidence

San Francisco, October 7, 2008

Marin, April 16, 2008

Alameda, March 12, 2008

State Bar Annual Convention and State Bar "Roadshow"

Fiduciary Accountings: Put 'Em Together, Pick 'Em Apart

Anaheim, September 29, 2007

San Francisco, November 2, 2007

Continuing Education of the Bar (CEB)

Fiduciary Accounting (lecturer and moderator)

Sacramento, San Francisco, San Diego, Los Angeles

Autumn 2006

Conservatorships (lecturer)

San Francisco, June 9, 2006

Fundamentals of Estate Planning (lecturer and moderator)

San Francisco (two-day program)

May 2005, April 2002, February 2001, July 1999

Basics of Drafting Revocable Trusts (lecturer and moderator)

San Francisco and Sacramento

August 2006, July 1999

Powers of Attorney (lecturer), 1998

California State Bar, Section Education Institute

"My Debtor Has Died, What Do I Do?" Santa Monica, January 2006

76th Annual Meeting, State Bar of California

"There Everywhere! The Use and Taxation of Powers of Appointment in Estate Planning," Anaheim, September 2003

California State University, Fullerton

Fiduciary Accounting (lecturer, Private Professional Fiduciary Certificate Program), San Francisco, California, 2003 and 2004

Estate Planning, Trust & Probate Law Section, Alameda County Bar Association

Making the Other Guys Pay: Attorneys' Fees and the Common Fund Theory
Oakland, March 15, 2006

Estate Planning, Trust & Probate Law Section, Bar Association of San Francisco

Making the Other Guys Pay: Attorneys' Fees and the Common Fund Theory
San Francisco, May 3, 2006

National Business Institute (NBI)

A Practical Guide to Estate Administration in California
Oakland, California, 1998

How to Draft Wills and Trusts in California,
Oakland, California, March 1997

Civic and Charitable Activities

Vice President (2007-2008), Legal Assistance for Seniors, an Alameda County non-profit that provides legal services to seniors troubled by consumer, housing and public benefit issues, and to seniors needing conservatorships or seeking guardianships.