



**Jay L. Beckerman**

Partner

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**Education**

New York University  
School of Law, LL.M.,  
Taxation, 1981  
University of San Diego  
School of Law, J.D., Cum  
Laude, 1974  
University of California at  
Berkeley, B.A., 1970

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**Memberships**

**BAR ADMISSIONS**

California

**MEMBERSHIPS**

State Bar of California  
Santa Barbara County  
Bar Association

Jay is a Partner and a member of the Estate Planning Group. Jay works on a broad range of estate and tax related planning, from wills and revocable trusts to more complex planning involving irrevocable trusts, charitable gifts and business succession planning. Jay holds an advanced degree in taxation, and his practice includes sophisticated tax planning for the transfer of wealth. Jay enjoys literature, chess and tennis.

**Representative Experience**

Multiple plans involving succession planning with transfer tax stands as an integral part of the planning; Design and implementation of multi-generational trusts for large wealth families.

**Community Involvement**

Jay served on the Cold Spring School District Board of Trustees for ten years and for six years on the governing board of the Friendship Adult Day Care Center, a non-profit organization devoted to the care of frail elderly adults. Jay currently serves on the Planned Giving Committees for the Visiting Nurse and Hospice Care of Santa Barbara.

**Practice Areas**

- Estate Planning
- Charitable Gift Planning
- Integrated Wealth Transfer Planning
- Succession Planning
- Trust Administration
- Valuation Planning