

Jeffrey A. Jaech

Jeffrey Jaech's expertise is in estate planning, estate and gift tax planning and compliance, and trust/estate administration. He also represents fiduciaries and beneficiaries in trust and estate disputes.

Background

Mr. Jaech helps our clients with their personal estate planning and wealth preservation, including tax and family business succession planning. Mr. Jaech assists trustees and executors in trust and probate administration, including help with tax issues and audits. He also represents fiduciaries and beneficiaries in trust and estate disputes and litigation. He helps donors with their charitable giving and advises charitable organizations. As founder and president of the nonprofit American Baseball Card Museum, he is knowledgeable about the issues collectors face when they wish to dispose of their collectables.

Mr. Jaech is a Certified Specialist in Estate Planning, Trust and Probate Law, as certified by the State Bar of California Board of Legal Specialization. He is a Fellow of the American College of Trust and Estate Counsel (ACTEC). He served a term (2004-2010) on the Executive Committee of the State Bar's Trusts and Estates Section. Mr. Jaech is a trustee of the Fresno Art Museum. He served nine years as a board member (Chair 2007-2009) of the Central Valley Community Foundation (President 2017 – present), and is now its legal counsel. From 2011 to 2014, he was a director of Meritas, an affiliation of law firms in all 50 states and over 70 countries. Mr. Jaech was a Special Agent of the Federal Bureau of Investigation from 1985 to 1991.

Professional Experience

- Planned the estates and prepared the appropriate documents for hundreds of clients
- Handled the administration of many probate estates
- Guided numerous trustees through the administration of trust estates, including the funding of subtrusts and related tax issues
- Consulted in the preparation of estate and gift tax returns, and handled tax audits, most of which involved the values of interests in family-owned businesses or ranches
- Helped fiduciaries or beneficiaries resolve serious disputes involving the administration of trusts and estates, and the interpretation of wills and trusts

Areas of Practice

- Corporate & General Business
- Estate Planning, Trusts & Estates
- Nonprofit

Contact

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Education

- Boalt Hall School of Law, University of California, Berkeley (J.D., 1977)
- Washington State University (B.A, Phi Beta Kappa, 1974)

Bar Admissions

- State Bar of California (1977)
- U.S. District Court (Eastern District)
- U.S. Tax Court