

Professional Biography



JEFFREY S. TACHIKI | SENIOR COUNSEL

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Jeff Tachiki guides clients through the complex issues that arise in estate planning, and during trust administration and probate, including disputed matters. Jeff has particular knowledge of California's nonconforming trust and estate law, specifically the elements relevant to trust and estate administration, and is a certified specialist with the State Bar of California in Estate Planning, Trust and Probate Law.

Counseling estate planning clients of all wealth levels across the country, Jeff utilizes various wealth preservation and advanced tax planning techniques to create plans that meet their objectives in the most favorable way. His experience includes preparing comprehensive estate plans for nontaxable estates and implementing complex transfer tax planning and wealth preservation methods.

Jeff is highly skilled at resolving disputes between trustees and beneficiaries. His trust administration work includes experience addressing cross-border issues, and he has dealt with multiple jurisdictions when working through the estate tax issues related to probate administrations.

A frequent speaker on a variety of trust and estate planning topics, Jeff is also very active in the Bay Area legal community. He serves as chair of the Estate Planning and Administration Committee for the East Bay Trusts and Estates Lawyers (EBTEL) and is a member of the Judicial Appointment Evaluation Committee for the Alameda County Bar Association.

PROFESSIONAL RECOGNITION

- Alameda County Bar Association Barristers' Distinguished Service Award, Young Lawyer, 2012
- Recognized by *Super Lawyers* as a Northern California Rising Star, 2009, 2010

PROFESSIONAL LEADERSHIP

- Alameda County Bar Association
 - Judicial Appointment Evaluation Committee (JAEC), Committee Member, 2016 - 2019
 - Trusts and Estates Section, Vice-Chair, 2011 - 2014
 - Barristers' Mentorship Program, Mentor, 2011 - 2013
 - Volunteer Legal Services
- East Bay Trusts and Estates Lawyers (EBTEL)
 - Estate Planning and Administration Committee, Chair, 2018
- Asian American Bar Association, Bay Area Chapter
 - Young Lawyer Mentorship Program, Mentor, 2011 - 2013
- Council of Business Advisors, Programs Chair

RELATED EMPLOYMENT

- The Tachiki Law Group, P.C., Principal, 2012 - 2018
- Tachiki | Arnold LLP, Managing Partner, 2009 - 2012
- The Myers Law Firm, P.C., Senior Associate, 2007 - 2009
- Peterson & Blum, P.C. Associate, 2006 - 2007
- Wilson, Elser, Moskowitz, Edelman, and Dicker, LLP, Associate, 2004 - 2006

CLERKSHIPS

- Honorable John S.W. Lim, Hawaii State Intermediate Court of Appeals , 2002 - 2003

PUBLICATIONS

03.06.2019

Dying and Private Keys

Blogs

Virtual Currency Report

Cryptocurrency owners must face death—be it their own, or that of anyone else with custody of the owner's cryptocurrency or other digital assets. We received a stark reminder of this when the Canadian exchange QuadrigaCX recently filed court papers indicating it may have lost access to nearly \$200 million USD of its customers' Bitcoin, Ether and other cryptocurrencies.

PRESENTATIONS

09.20.2018

How To Be An Ethical Trusts and Estates Attorney

Speaking Engagements

Continuing Education of the Bar (CEB)

05.22.2018

IRA Trusts and Beneficiary Designations

Speaking Engagements

Council of Business Advisors

12.14.2017

Trusts: The Ultimate Guide – Retirement Trusts

Speaking Engagements

National Business Institute

10.31.2017

Mitigating Successor Trustee Liability for Prior Fiduciary Breach: Trust Structure and Administrative Tools

Speaking Engagements

Strafford Publications

07.25.2017

Transfer Tax Issues on the Certified Specialist Exam

Speaking Engagements

Continuing Education of the Bar (CEB) Estate Planning Intensive Course

08.12.2015

Taking the Certified Specialist Exam

Speaking Engagements

East Bay Trusts and Estates Lawyers (EBTEL)

01.27.2015

Property Tax Issues in Estate Planning – An Overview

Speaking Engagements

Council of Business Advisors

10.28.2014

Probate Boot Camp – First Steps

Speaking Engagements

National Business Institute

AREAS OF FOCUS

PRACTICES

- Trust & Estate Planning

BAR AND COURT ADMISSIONS

- California

EDUCATION

- The University of Utah, S.J. Quinney College of Law, J.D., 2002, Member and Editor, *Utah Law Review*
- University of Utah, B.A., Speech Communication, 1998