Lara N. Gilman

Partner

lgilman@fbm.com
San Francisco: 415.954.4913

Lara Gilman counsels individuals and families on estate and succession planning. Lara has extensive experience integrating and simplifying the complexities of wealth succession strategy and execution for individuals, families and businesses. She specializes in advising high net worth clients, frequently acting as a *de facto* general counsel, often in concert with a family office. In this role, she advises clients on a broad range of legal topics related to their personal, business and financial activities.

A family wealth practice operates at the junction of technical legal expertise and a client's personal and family situation and objectives. Lara views her role as understanding and facilitating the client's goals. Because her clients are always time-pressed, Lara applies a direct and highly personal approach that emphasizes making the engagement as easy for the client as possible – she strives to understand what the client is concerned about, and then helping them get there.

Lara is particularly skilled at explaining complex concepts to clients in understandable, meaningful ways. Her clients appreciate her honest, straightforward approach.

Lara offers practical advice to comprehensively plan for the distribution and protection of her client's estates. Given that this work frequently has intergenerational components, she often also assists in advising and helping educate the next generation on the opportunities and responsibility that come with their role in management of the family's assets. With her unique blend of experience as an estate planning, probate, business and tax attorney, Lara is a trusted advisor who helps manage all aspects of family wealth planning.

Distinctions

- Certified Specialist in Estate Planning, Trust and Probate Law by the State Bar of California
- Certificate in Family Business Advising from the Family Firm Institute (2009)
- *Chambers HNW*, Private Wealth Law, Northern California (2019-2020)
- *Best Lawyers in America* in the area of Trusts and Estates (2018-2021)
- Northern California *Super Lawyers* in the area of Estate & Probate (2011-2020)

Memberships and Affiliations

- San Francisco Estate Planning Council
- Family Firm Institute

Publications

8/12/2016
Proposed Section 2704 Regulations Would Impose Significant Restrictions on Valuation Discount Planning for Family Controlled Entities

Services

- Exempt Organizations
- Family Wealth
- International Tax and Estate Planning
- Private Client
- Wine

Education

- Golden Gate University (LL.M., 1999)
  - high honors
- University of California, Davis, School of Law (J.D., 1993)
- University of California, Santa Barbara (B.A., 1990)
  - *cum laude*
  - History

Bar Admissions

- California

7/12/2013
Revisiting Estate Planning Post-DOMA

1/22/2013
Charitable Giving: Better Late than Never

7/11/2012
The Opportunity to Take Advantage of Favorable Tax Laws is Expiring

12/1/2011
End of Year Planning: Getting Comfortable with Making Large Gifts

3/10/2011
The Impact of the New Laws on Your Existing Estate Plan

12/20/2010
Commentary: As 2010 fades away, so do some estate opportunities

12/17/2010
Lower Gift and Estate Taxes Provide New Opportunities in 2011

11/29/2010
End of Year Planning Opportunities

12/29/2009
Federal Tax Law Summary 2010

11/20/2009
"No News Is No News" on the Future of Estate Taxes

11/16/2009
Taking Advantage of Low Interest Rates

8/27/2009
Advance Health Care Directives—Don’t Be Scared

7/1/2009
Life Insurance in the Present Investment Environment

5/22/2009
Keeping the Peace: Estate Planning in the Blended Family

4/1/2009
It's Never Too Late To Redeem Yourself: Redemptions As An Estate Planning Technique

1/13/2009
Estate Tax Exemption Amount Increased on January 1, 2009; Gift Tax Exemption Amount Remains Unchanged

10/8/2008
Rescue Bill Provides for Gifts from IRAs Direct to Charities

9/18/2008
A Family Affair: Succession Planning Together to Avoid Disputes Among Children

5/20/2008
Unintended Consequences - The Hunt Family and the Story of a Parent’s Generosity

Outside the Office

In addition to parenting two teenage children, Lara is an avid equestrian and a voracious reader.