



## Taylor E. Porter

Senior Associate

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Taylor Porter advises and assists high net worth individuals and families on developing comprehensive estate, gift, and income tax planning strategies to achieve their unique financial planning and wealth transfer goals. She collaborates with clients to create estate plans tailored to achieve their objectives, represents individual and institutional fiduciaries and beneficiaries in trust and probate administrations, counsels clients on their lifetime gifting options, helps on corporate and partnership formations, dissolutions and agreements, and assists with business succession planning and charitable giving.

Taylor seeks to develop a personal and in-depth understanding of each individual she assists and family dynamic to advise accordingly and create a strong foundation for a multi-generational working relationship. Her compassionate approach and attention to detail provides a sense of security for clients.

### Memberships and Affiliations

- Leadership Council on Legal Diversity (LCLD) Pathfinder (Class of 2024)
- Member, Bar Association of San Francisco
- Associate Board, League to Save Lake Tahoe

### Outside the Office

In her free time, Taylor enjoys running outside, especially across the Golden Gate Bridge, cycling on her Peloton, and taking her dog on hikes.

### Services

- Private Client
- Family Wealth
- Ultra-High Net Worth

### Education

- Santa Clara University School of Law (J.D., 2018)
  - . Technical Editor, *Santa Clara Law Review*
  - . Senior Associate, *Santa Clara Journal of International Law*
  - . CALI Awards - Family Wealth Management, Leadership for Lawyers
- University of Southern California, Leventhal School of Accounting (B.S., 2015)
  - . Accounting

### Bar Admissions

- California

### Court Admissions

- U.S. District Court (N.D. Cal.)

