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David is a paralegal in the private client and tax team.

He focuses on all aspects of estate and trust administration. As a paralegal working in the legal field for nearly 20 years, his experience includes:

- probate and trust accounting;
- estate and trust administration;
- oil, gas and mineral interests;
- real property;
- nonprofit;
- corporate; and
- drafting of wills, trusts and ancillary documents.

David is a Registered Minerals and Royalty Manager by the Institute of the National Association of Royalty Owners (NARO) Foundation.

Talks

- 'Advanced Probate Skills for Paralegals: Marshalling and Managing Estate Assets,' Institute for Paralegal Education (IPE) course - November 8, 2024, speaker

- '*Distributions, Final Accounting and Closing the Estate*,' National Business Institute California Probate and Trust Administration Seminar - December 1, 2023, speaker
- '*Corporate Transparency Act: Pulling Back the Curtain & Shining a Spotlight on Client Assets*,' Beverly Hills Bar Association Trust & Estates Law Seminar - November 21, 2023, speaker
- '*Corporate Transparency Act - Pulling Back the Curtain and Shining a Spotlight on Client Assets*,' 44th Annual Inland Empire Estate Planning Seminar - November 1, 2023, speaker
- '*Cleaning House: A Check-Up on Estate Planning for Real Estate*,' Federal Bar Association and MyLawCLE - June 6, 2023
- '*Probate Process from Start to Finish*,' National Business Institute Seminar, Pasadena - November 20, 2019
- '*NBI - Probate: Everything You Need to Know*,' __ National Business Institute Seminar, Los Angeles - February 13, 2019
- '*Probate: Everything You Need to Know*,' National Business Institute Seminar, Long Beach - December 13, 2018, presenter
- '*Top 9 Probate Problems and How to Solve Them*,' National Business Institute Seminar, Ventura, CA - November 9, 2017, presenter
- '*Probate Boot Camp*,' National Business Institute Seminar, Long Beach, CA - December, 12, 2016, presenter

External publications

'Navigating regulatory compliance for your California entity,' Withers Insight and Client Alert - October 31, 2024, authored

'*Don't let your trust fall short: how the US tax season can reveal funding gaps*,' Withers Insight and Client Alert - March 20, 2024, authored

'Cleaning house, a check-up on estate planning for your real property,' Withers Insight and Client Alert - January 31, 2023, authored

Education

UC Riverside, B.A. Mathematics

Languages

English

Memberships

The Music Unlocks Success In Children Foundation (2008-2015)

Los Angeles County Bar Association

Key dates

Year joined: 2015

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