

Allied Experts – Law Firms



Gary J. Talavera, LLM

Mr. Talavera limits his practice exclusively to estate and gift tax planning and trust administration. He specializes in working with high net worth individuals. He has extensive experience in drafting living trusts, irrevocable trusts for the purchase of life insurance, generation-skipping trusts, intentionally defective irrevocable trusts, Grantor Retained Annuity Trusts (GRATs), Qualified Personal Residence Trusts (QPRTs), charitable trusts, limited liability companies and family limited partnerships. Mr. Talavera is also experienced in post-mortem administration including division of assets, funding of sub-trusts and the preparation of the estate tax return. Mr. Talavera represents clients with estates ranging from five million to over one hundred million dollars.

A significant portion of Mr. Talavera's practice consists of working with clients and their advisors to identify and present solutions to the most common problems clients face, such as: i) transferring the family business; ii) providing liquidity; and iii) protecting the beneficiaries from the attacks of creditors.

Mr. Talavera received his Bachelor's degree in Accounting from California State University, Northridge in 1991. Mr. Talavera received his Law degree from the University of San Diego, School of Law in 1994. Mr. Talavera then received his Masters in Legal Letters (LL.M.) in Taxation from Golden Gate University School of Law in 2001. Mr. Talavera has been a California State Bar Board of Legal Specialization, Certified Specialist in Estate Planning, Trust & Probate Law since 2001.