

## **CURRICULUM VITAE**

**Jeffrey R. Loew, Esq.**  
**Loew Law Group, A Professional Law Corporation**  
**1650 Borel Place, Suite 104**  
**San Mateo, CA 94402**

June 2018  
Billing rate: \$450 per hour

### **Positions**

June 2016-Present	Founder, Shareholder Loew Law Group, A Professional Law Corporation San Mateo, California
2011-2016	Founder, Shareholder Burns Loew, A Professional Law Corporation San Mateo and Mountain View, California
2005-2011	Attorney, Trust, Estate & Fiduciary Litigation Group (2005- 2010); Attorney, Estate Planning, Trusts & Wealth Transfer Group (2010-2011) Carr McClellan Ingersoll Thompson & Horn Burlingame, California
2001-2005	Attorney, Litigation Group, Securities Litigation Group Cooley LLP Palo Alto, California

### **Certification and Licensing**

2012	Certified Specialist, Estate Planning, Trust and Probate Law State Bar of California Board of Legal Specialization
2001	Admitted to practice before California Supreme Court and all California State Courts, as well as Ninth Circuit Court of Appeal and Northern District and Central District of California

## Education

- 2001 University of California,  
Berkeley, School of Law (Boalt  
Hall) Berkeley, California  
J.D., Certificate in Law & Technology
- 1998 The Ohio State  
University, Columbus,  
Ohio  
M.A. (English Composition and Literature)
- 1995 University of St.  
Thomas St. Paul,  
Minnesota  
B.A., *cum laude* (English with Writing Emphasis, Justice & Peace  
Studies; Minor: Quantitative Methods & Computer Science)

## HONORS AND ACTIVITIES

President and Founding Board Member, San Mateo County Law Library Foundation (2015-Present)

Executive Committee, Estate Planning and Probate Section, San Mateo County Bar Association (2010-Present, Chairman, January 2014-December 2015; Vice Chair, January 2012-December 2013; Treasurer, January 2010-December 2011)

Community Affairs Subcommittee, San Mateo County Bar Association (2008-2010; 2016-Present)

Board of Trustees and Executive Committee, Silicon Valley Bar Association (2011-2015; Treasurer, 2015; Judicial Liaison to San Mateo County Probate Court, January 2011-December 2015)

Settlement Neutral, Santa Clara County Superior Court, 2016-Present

Independent Counsel Panel, San Mateo County Superior Court, 2017-Present

Speaker's Bureau, California State Bar Trusts and Estates Section, 2010-Present

Mill-Peninsula Hospital Foundation, Philanthropy Advisors Council,

2012-Present

Top 100 Northern California “Super Lawyer,” 2016-2017; “Rising Star,” Northern California *Super Lawyers* Magazine, 2009, 2010, 2011; “Super Lawyer,” 2014-Present

## **PRESENTATIONS**

The San Francisco Foundation, April 29, 2008 (“Preempting Estate Litigation”)

Trust and Estate Section of the Contra Costa County Bar Association, March 4, 2009  
 (“Preempting Estate Litigation”)

Union Bank, N.A., San Francisco, October 8, 2010 (“The Trustee's Judgment in Contemplating Litigation”)

Estate Planning & Probate Section, San Mateo County Bar Association, July 21, 2011  
 (“Preempting Estate Litigation”)

84th Annual Meeting of the State Bar of California, September 18, 2011 (“Litigating a Case In Probate Court: The Basics In Sixty Minutes”) with Brian E. Kulich

Estate Planning & Probate Section, San Mateo County Bar Association, March 14, 2012 (“No Good Deed: Prohibited Transfers to Friends, Fiduciaries, and Other Outlaws under Section 21380”) with Brian E. Kulich and Mary Pryce.

Silicon Valley Bar Association, April 18, 2012 (“Before and After: The Trustee's Duty to Residual Beneficiaries Before the Trustor's Death (And After *Giraldin*)”) with Steven P. Braccini.

Senior Peer Counseling Training, Peninsula Family Service, San Mateo, California, May 21, 2012 (“The Law and Elder Abuse – Identification and Prevention”)

New Attorneys’ Roundtable, Estate Planning & Probate Section, San Mateo County Bar Association, July 12, 2012 (“Is It Open Season on Wills and Trusts? Advising Clients and Minimizing Litigation Under the New No Contest Statutory Regime”) with John D. Minton

LawReview CLE, August 21, 2012 (“Everything You Ever Wanted to Know About Litigating a Case in Probate Court”) with Brian E. Kulich

Estate Planning & Probate Section, San Mateo County Bar Association, September 20, 2012 (“Before and After: The Trustee's Duty to Residual Beneficiaries Before the Trustor's Death (And After *Giraldin*)”) with Steven P. Braccini.

85th Annual Meeting of the State Bar of California, October 12, 2012 (“Foundations of Probate

Litigation: Incapacity and Undue Influence”) with Brian E. Kulich

Senior Peer Counseling Training, Peninsula Family Service, San Mateo, California, November 1, 2012 (“The Law and Elder Abuse – Identification and Prevention”)

Probate & Estate Planning Section, Marin County Bar Association, January 15, 2013 (“Tales from the Dark Side: Tips for Pre-Emptying Estate Litigation”)

Estate Planning, Probate & Trust Section, Bar Association of San Francisco, April 3, 2013 (“Tales from the Dark Side: Tips for Pre-Emptying Estate Litigation”)

Senior Peer Counseling Training, Peninsula Family Service, San Mateo, California, May 21, 2013 (“The Law and Elder Abuse – Identification and Prevention”)

Estate Planning & Probate Section, San Mateo County Bar Association, June 11, 2013 (“Legal Specialization – What’s in it for You?”) with Dan Brown, Mary Pryce, and Jessica Rowe

Redwood Law Center, October 3, 2013 (“Foundations of Probate Litigation: Incapacity and Undue Influence”)

New Attorney Roundtable, Silicon Valley Bar Association, October 9, 2013 (“That Looks Like a *Heggstad* Problem”) with Steven P. Braccini

86th Annual Meeting of the State Bar of California, October 10, 2013 (“The Teflon Trustee: How to Ensure that Liability Doesn’t Stick.”) with Steven P. Braccini and Brian E. Kulich

Senior Peer Counseling Training, Peninsula Family Service, San Mateo, California, November 12, 2013 (“The Law and Elder Abuse – Identification and Prevention”)

Public Administrator, Guardian, and Conservator Training, Office of the Public Guardian, Santa Clara County, November 21, 2013 (“Conservatorships from 50,000 Feet”) with Jessica L. Rowe

“Funky Credit Day,” San Mateo County Bar Association, January 24, 2014 (“A Practitioner’s Minefield: Ethical Issues Arising in the Trusts and Estates Arena”) with the Hon. Steve Dylina, Brian E. Kulich, and Steven P. Braccini

Public Administrator, Guardian, and Conservator Training, Office of the Public Guardian, Santa Clara County, January 31, 2014 (“Conservatorship Investigation Basics”) with Juliette D. Nguyen

New Attorneys’ Roundtable, Estate Planning & Probate Section, San Mateo County Bar Association, February 13, 2014 (“That Looks Like a *Heggstad* Problem”)

Peninsula Estate Planning Council, May 7, 2014 (“Tales from the Dark Side: Tips to Help

Estates Planners and Fiduciaries Avoid Estates and Trusts Litigation”) with Jill E. O’Sullivan

Legal Assistance for Seniors, Ninth Annual Conference on Elder Abuse, May 20, 2014 (“Elder Abuse & Ethical Issues in Estate Planning”) with Hon. Steve Dylina, Steve Braccini & Brian Kulich

Stockton Estate Planning Council, May 21, 2014 (“Tales from the Dark Side: Tips to Help Estates Planners and Fiduciaries Avoid Estates and Trusts Litigation”), with Jill E. O’Sullivan

Hopkins & Carley, June 30, 2014 (“No Contest Clauses after *Donkin v. Donkin* – Another Fine Mess?”)

Silicon Valley Bar Association, September 17, 2014 (“Beyond the Four Corners – Will Construction After *Estate of Duke*”)

Estate Planning & Probate Section, San Mateo County Bar Association, October 30, 2014 (“Legal Specialization – What’s in it for You?”) with Dan Brown, Mary Pryce, and Jessica Rowe

Peninsula Family Service, January 22, 2015, “Intimate Partner Violence in the LGBTQ Community” (Moderator, Introduction and Closing Comments), with various speakers

San Mateo County Bar Association, Funky Credit Day XX, January 23, 2015 (“Elder Abuse and Ethical Issues in Estate Planning”) with Hon. Steve Dylina, Steve Braccini, and Brian Kulich

Senior Peer Counseling Training, Peninsula Family Service, San Mateo, California, March 31, 2015 (“The Law and Elder Abuse – Identification and Prevention”)

San Mateo County Bar Association, Barristers, April 23, 2015 (“Starting Your Own Legal Practice”)

Legal Assistance for Seniors, Tenth Annual Conference on Elder Abuse, May 19, 2015 (“Financial Elder Abuse: Judicial, Civil and Criminal Perspectives”) with Hon. Steve Dylina, Brian E. Kulich, Steven P. Braccini, and Tara Heumann

Silicon Valley Bar Association, New Attorney’s Roundtable, July 8, 2015 (“Estate Planning for Digital Assets”) with B. Douglas Robbins

Silicon Valley Bar Association, New Attorney’s Roundtable, December 9, 2015 (“Estate Planning and Financial Elder Abuse”) with Steve Braccini

The Golub Group, San Mateo, January 25, 2016 (“Financial Elder Abuse – Identification and Prevention”)

San Mateo County Bar Association, Funky Credit Day XXI, January 29, 2016 (“Elder Abuse & Ethical Issues in Estate Planning”) with Hon. Steve Dylina, Steve Braccini and Tara Heumann

Estate Planning & Probate Section, San Mateo County Bar Association, February 10, 2017 (“Legal Specialization – What’s in it for You?”) with Mary Pryce and Jessica Rowe

Estate Planning & Probate Section, San Mateo County Bar Association, October 19, 2017 – (“Financial Elder Abuse & Ethical Issues for the Estate Planner – a Litigation Prevention Primer”)

San Mateo County Bar Association, Funky Credit Day XXIII, January 12, 2018 (“Negotiation and Settlement: Ethics and Strategy”) with Hon. Laurel Beeler, Hon. Robert Foiles, and Niall McCarthy, Esq.

East Bay Trusts & Estates Lawyers, April 18, 2018 (“Financial Elder Abuse & Ethical Issues for the Estate Planner – a Litigation Prevention Primer”)

## **PUBLICATIONS**

“*In re Intel Corp.*” 15 *Berkeley Tech. L.J.* 333 (2000).

“Tales from the Dark Side: Ten Tips for Estate Planners Seeking to Avoid Estate Litigation.” *The Docket, the Official Publication of the San Mateo County Bar Association*. January-February 2012.

“Before and After: A Trustee’s Duties to Remainder Beneficiaries Before a Settlor’s Death (And After *Estate of Giralдин*)” (with Steven P. Braccini). *Trusts & Estates Quarterly*, Volume 18, Issue 3 (State Bar of California, Fall 2012)

“Taking it to the Trustee” (with Steven P. Braccini). *The Docket: The Official Publication of the San Mateo County Bar Association*. January-February 2013.

“Trustees, Look Out!” (with Steven P. Braccini). *The Docket: The Official Publication of the San Mateo County Bar Association*. January-February 2014

“Make No Mistake – *Estate of Duke* Allows Reformation of Unambiguous Wills” (with Steven P. Braccini). *Trusts & Estates Quarterly*, Volume 21, Issue 4 (State Bar of California, Winter 2015)