Fox Rothschild LLP
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Peter S. Myers

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Peter Myers is Certified as a Specialist in Estate Planning, Trust and Probate Law by the State Bar of California's Board of Legal Specialization. Handling high-net-worth planning, business succession, and trusts and estates disputes, he guides individuals and families who need a reliable relationship with a caring, experienced lawyer who will assist them in times of greatest personal opportunity, life event, or crisis.

Peter frequently writes and teaches in the areas of estate planning, family business entities and estate planning and has authored and published treatises, books and articles, regularly speaking throughout the country on topics of interest to wealthy families and their advisers, as well as at conventions of professionals. His speaking engagements include the National Network of Estate Planning Attorneys, WealthCounsel, LLC, The Southern California Institute, California Continuing Education of the Bar and various ancillary CLE Providers. His published work appears in CEB, Trusts and Estates Magazine, iUniverse, and Wonderdads.

Before Fox Rothschild

Prior to joining Fox Rothschild, Peter was a principal of Myers Kenney P.C. (previously known as Myers Urbatsch, P.C.).

Peter also practiced antitrust and securities law with a national firm from 1987 through 1992 before starting his own firm.

Beyond Fox Rothschild

Peter is the executive editor of the book *Business Succession Planning: Strategies for California Estate Planners and Business Attorneys*, published by Continuing Education of the Bar-California. He was an adjunct faculty member at Golden Gate University, San Francisco campus, and The Wealth Strategies Institute at Michigan State University, where he taught stock options planning.

Peter also offers popular educational seminars and training courses for consumers, attorneys, business owners, accountants and other related professionals, including the annual Fiduciary Attorney Summit in (to be held this year in Santa Barbara) and a Review Course for the Exam to Become a California Certified Specialist in Estate Planning, Trust and Probate Law.

Honors & Awards

- Named a Northern California "Super Lawyer" by *Super Lawyers Magazine* (2004-2018)
- Named among the “Top 100 Lawyers” in the U.S. by The Robb Report/*Worth* Magazine (2005-2006)
- Martindale-Hubbell "AV" rated since 1995
- Named the Business Succession Attorney of the Year by *Lawyers' Monthly* magazine in 2013
- Recipient of the Wiley W. Manuel Award in 1990-91 and 1991-92 (State Bar of California Board of Governors’ Award for provision of legal services to the poor)
- Recipient of the Outstanding Attorney in Public Service Award, 1991 (BASF Volunteer Legal Services Program)

Practice Areas

- Taxation & Wealth Planning
- Trust & Estate Law & Administration
- Federal Estate & Gift Tax Planning
- Fiduciary Litigation
- Food & Beverage
- Private Equity

Bar Admissions

- California
- Nevada

Court Admissions

- U.S. Tax Court
- U.S. Court of Appeals, Ninth Circuit
- California Supreme Court
- U.S. District Court, Central District of California
- U.S. District Court, Eastern District of California
- U.S. District Court, Northern District of California
- U.S. District Court, Southern District of California

Education

- American University (B.A., *cum laude*, 1981)
    - American College, Paris
    - American University, Rome
- University of California, Hastings College of the Law (J.D., 1984)

Memberships

- Estate & Trust Education Resources
    - Founding Member and Content Editor
- California CEB Advisory Board, 2007-2014
- California Bar Association

  - Tax, Estate Planning Sections
  - Trust Law Section
- San Francisco Bar Association
- East Bay Estate Planning Council
- East Bay Tax Club
- East Bay Trust and Estates Lawyers (EBTEL)
- National Network of Estate Planning Attorneys
  - California Forum Chair (Faculty, Advanced Planning Program, 2010-present)
- WealthCounsel LLC
  - WealthCounsel Advisors' Forum (2006-2016)
- Fellow, The Laureate Circle (a national estate and wealth planning strategies think tank)

Board of Directors

- California Continuing Education of the Bar (CEB), Advisory Board of Directors (2006-2014)
- Oakland East Bay Symphony (2008-2013)
- Oakland Youth Orchestra (2011-2013)
- Barristers Club of San Francisco (1992-1995)
- Holy Family Day Home (1993-1996)

Pacific Currents: State Law and Tax Updates & Essentials

Fox Rothschild presents a 12-part series of CE programs tailored to California, Washington and Nevada-based estate planning, trust and probate attorneys and fiduciaries. The focus of this platform will be on current developments in substantive state law.

Hosted by Fox Partner **Peter S. Myers**, the series will offer monthly WebEx training sessions designed to help you swim with the tides and keep up with current trends in the industry. **Register for the full course here.**

Please note: CE credit is only awarded for *live* participation, not recordings.

TRUSTOR'S ESTATE PLAN: PLANNING, PROVISIONS AND IMPLEMENTATION

Noon - 1 pm PT, June 8, 2018

CALIFORNIA INCOME TAXATION OF DEPARTING RESIDENTS AND THEIR TRUSTS

Noon - 1 pm PT, July 13, 2018

If you are drafting or establishing California trusts for income-tax-sensitive clients, you might want to rethink your trustee selection clauses. Mistakes here, at a 13.3% fiduciary income tax, can be costly to your clients and, possibly, you. Non-residents do not understand why they should pay 13.3% on their income, when they have little or nothing to do with California. That sentiment does not change simply because the non-resident once lived in California, or had a parent living in California, who bequeathed them some appreciating assets. In this session, Edwin P. Antolin and Peter S.

Myers discussed the changing landscape of the resident-non-resident departing Californian, the resident-non-resident trust, and how planners can fairly easily avoid the issue by proper drafting.

DEVELOPMENTS IN RUFADAA

Noon - 1 pm PT, August 10, 2018

PRESERVING THE CALIFORNIA PROPERTY TAX BASE BY AVOIDING CHANGES IN OWNERSHIP & ASSERTING EXCLUSIONS

Noon - 1 pm PT, September 14, 2018

WHAT IS HEMS IN CALIFORNIA?

Noon - 1 pm PT, October 12, 2018

BLENDED FAMILY PLANNING AND ADMINISTRATION

Noon - 1 pm PT, November 9, 2018

THE ALPHABET SOUP OF ESTATE PLANNING: ADVANCED PLANNING FOR BEGINNERS

Noon - 1 pm PT, December 14, 2018

DEVELOPMENTS IN VALUATION & APPRAISALS

Noon - 1 pm PT, January 11, 2019

UPDATE ON ABLE ACCOUNTS AND THEIR USE

Noon - 1 pm PT, February 8, 2019

REGIONAL TRUSTS & ESTATES CASE LAW UPDATE

Noon - 1 pm PT, March 8, 2019

Topics include: Updates to relevant California, Nevada and Washington law

COMMUNICATING WITH BENEFICIARIES: CONFIDENTIALITY, DISCLOSURES & LINES OF COMMUNICATION

Noon - 1 pm PT, April 12, 2019

DEVELOPMENTS IN HEGGSTAD, UKKESTAD & PC 850 PETITIONS

Noon - 1 pm PT, May 10, 2019

Register for the full course here.

Agenda is subject to change. Please note: CE credit is only for live participation.

For Members: Online Course Access