

## **Daniel B. Newbold**

Partner

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## **Practice Areas**

- Trusts and Estates

## **Overview**

Daniel is a well-respected California estate-planning attorney who specializes in helping families plan for their future and protect their assets. He has over 20 years of experience in the field and has a deep understanding of the complexities of estate planning. He is highly skilled in navigating the ever-changing landscape of tax laws to maximize the benefits for his clients, and experienced in litigating disputed trust and estate matters.

## **Estate Planning**

Daniel provides personalized and comprehensive solutions that fit each client's unique circumstances. He helps clients understand the importance of estate planning, and guides them through the process of creating a will, setting up trusts, and creating advanced directives to ensure their wishes are carried out in the event of incapacity. He also helps them understand the probate process, and how to avoid probate if possible.

Daniel believes that estate planning is not just about minimizing taxes, but also about protecting and preserving the assets of his clients, and ensuring that they are passed on to their loved ones in the most efficient and tax-advantaged way possible. He takes the time to understand each client's goals and concerns, and provides personalized and comprehensive solutions that fit their unique circumstances.

For high-net-worth clients, Daniel focuses on reducing estate taxes through various estate-planning techniques such as IDGTs, GRATs, SLATs, and other sophisticated planning strategies. He is an expert in the use of advanced estate planning techniques to minimize estate taxes and maximize wealth transfer for his clients. He also has experience in creating and implementing family limited partnerships, charitable trusts, and other entities to help

his clients achieve their goals.

## **Litigation**

In addition to his estate planning expertise, Daniel has significant experience in litigating disputed trust and estate matters. He has successfully represented clients in court through trial in various types of trust and estate disputes, such as will contests, trust contests, disputes over the interpretation of trusts and wills, disputes over the administration of trusts and estates, and disputes over accountings by trustees. He understands the emotional and financial stress that can arise from these disputes and provides his clients with effective representation, whether through negotiation or in court through trial.

Daniel helps families develop amicable solutions in the event of disagreement over the distribution and administration of estate-planning documents. While Daniel strives to negotiate effective solutions that can quickly and effectively resolve disagreements, unfortunately, some estate-related disputes are unavoidable and need to be decided by a judge. To that end, Daniel has significant experience representing clients in contested matters before probate judges in many of the Bay Area's counties, including Alameda, Contra Costa, Santa Clara, San Mateo, and San Francisco counties. Daniel has tried many cases as first-chair attorney to verdict and has argued cases before the California Court of Appeal.

## **Professional & Community Affiliations**

- Former President, East Bay Trusts and Estates Lawyers
- Member, Trusts & Estates Section, State Bar of California
- Member, Tax Section, State Bar of California

## **Recognition**

- Named, Northern California Super Lawyers, *Super Lawyers*, 2020-2022

## **Bar Admissions**

- California

## **Education**

- **LL.M.**, University of Washington, 2004
- **J.D.**, Santa Clara University School of Law, 2003
- **B.S.**, Arizona State University, 1999

## Recent Articles/News

- [Donahue Fitzgerald Attorneys Named 2022 Super Lawyers](#)
- [Donahue Fitzgerald Attorneys Named 2021 Super Lawyers](#)
- [Donahue Fitzgerald Attorneys Named 2020 Super Lawyers](#)

## Recent Speaking Engagements

- September 23, 2021, Trust Administration Boot Camp , East Bay Trusts & Estates Lawyers, Virtual

## Past Speaking Engagements

- “Heirs and Devisees: Cooperative and Competing, Managing Expectations,” East Bay Trusts and Estates Lawyers, September 2019
- “Managing the Inventory of a Probate Estate,” National Business Institute Seminar, May 2014
- “Family Elections in [Probate Law](#). How to Determine if They are a Reasonable Option,” National Business Institute Seminar, May 2014
- “Estate Planning Strategies Using FLPs and LLCs,” National Business Institute Seminar, December 2011
- “Trusts 101,” National Business Institute Seminar, September 2011
- “Taxation of California Domestic Partnerships,” Paralegal Association of Santa Clara County, 31st Annual Educational Seminar, October 2009
- “Basic and Advanced Estate Planning Techniques,” Addison Avenue Investment Services Client Seminar, October 2008
- “Creating Wealth for Your Heirs Without Additional Tax,” Hopkins & Carley client seminar, February 2008
- “What Happens When a Customer Dies – Recovering Debts Owed to You Upon a Customer’s Death,” Benicia Chamber of Commerce, Small Business Society, August 2007