

Wilfrid F. Roberge, Jr.

Of Counsel

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Practice Areas

- Trusts and Estates

Overview

Wilfrid F. Roberge, Jr. is of counsel at Donahue Fitzgerald, specializing in trusts and estate planning. Mr. Roberge has over 40 years of experience in the field, has completed the training and testing requirements to achieve the designation of Certified Specialist in Probate, Estate Planning & [Trust Law](#) from the California Board of Legal Specialization, State Bar of California, and has been so certified for over 20 years.

Mr. Roberge provides a full range of services related to estate planning, wills and probate, and wealth preservation for the firm's clientele. His clients include business owners, and executives and employees served by the firm's business practice, as well as other individuals, executors and beneficiaries. He has handled estates and engaged in planning involving international assets subject to both foreign and United States laws.

Much of Mr. Roberge's practice involves designing and implementing estate planning strategies that accomplish his clients' short and long-term goals. He analyzes estates to determine the potential for estate growth and the effect of inflation upon asset value and taxation, as well as making recommendations regarding generation skipping transfer tax and gift tax exclusions. He has extensive experience establishing trusts, including living trusts, generation-skipping trusts, life-insurance trusts and various kinds of grantor trusts. He assists clients in evaluating the effectiveness of charitable trusts and gifts and the implications of gifting money and other assets to avoid loss of asset value to estate taxes. As part of the estate planning process, Mr. Roberge prepares trusts, pour over wills, powers of attorney which grant an individual chosen by the client the authority to make property management and Advance Healthcare Directives by which the client can specify who can make healthcare decisions on behalf of the client in case the client becomes incapable of making such decisions for himself or herself. If a gift program is instituted, a special power to make gifts is often prepared as well, in order to continue the program in the event

of incapacity of the client.

As part of his responsibilities, Mr. Roberge advises the firm's business law attorneys on a broad range of topics, such as designing a structure of a business to facilitate its transfer to partners, family members or employees upon the retirement or death of a principal, with particular attention being paid to the effect on value of different kinds of business structures. He also works closely with the firm's litigators in the event of contested wills and disputes over the administration of trusts, evaluating the strengths and weaknesses of the case to identify the best litigation strategy.

Mr. Roberge served for two years as an enlisted attorney with the U.S. Army following law school. After returning from service in Vietnam, he joined the firm in 1966, and became a partner in 1971.

Professional & Community Affiliations

- Member, Trust and Estate Section, State Bar of California
- Member, Contra Costa County Bar Association
- Former Member, Alameda County Bar Association
- Member, East Bay Trusts and Estates Lawyers (EBTEL)
- Member and Former President, Mt. Diablo Estate Planning Council
- Member, East Bay Estate Planning Council
- Former President, American Lung Association of the East Bay
- Member and Former President, Kiwanis Club of Walnut Creek
- Former Treasurer and Former President, Mount Diablo Astronomical Society

Recognition

- Certified Specialist, Probate, Estate Planning & Trust from the California Board of Legal Specialization, *State Bar of California*
- Named, Super Lawyer, *San Francisco Magazine*, every year since 2004
- Awarded, AV® Preeminent™ peer-review rated, *Martindale-Hubbell Distinguished™*
- Names, The Best Lawyers in America®, Trusts and Estates, *Best Lawyers*, 2021-2022

Bar Admissions

- California

Education

- **J.D.**, Stanford Law School, 1964
- **B.A.**, University of California, Riverside, 1961

Recent Articles/News

- [Donahue Fitzgerald Attorneys Recognized in the Best Lawyers in America® 2022 Edition](#), *Best Lawyers in America*, 2022 Edition
- [Donahue Fitzgerald Attorneys Recognized in the Best Lawyers in America® 2021 Edition](#), *Best Lawyers in America*, 2021 Edition
- [Donahue Fitzgerald Attorneys Named 2018 Super Lawyers](#)