

## Laurie-Ann D. Look

### Shareholder

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Phone: 650.804.7600

- **Services**

- Family Wealth & Tax Planning
- Trust & Estate Counseling



### Overview

Laurie Ann D. Look is a member of Hopkins & Carley's Family Wealth & Tax Planning Practice. She previously served as Co-chair of the group for several years. Her practice focuses on estate planning, strategic wealth transfer and management planning, and estate and trust administration.

Laurie's clients include business professionals, venture capitalists and public company executives and directors, as well as their families. She has extensive experience counseling and assisting clients using a combination of entities and wealth transfer strategies, including:

- Grantor retained annuity trusts
- Carried interest planning
- Qualified personal residence trusts
- Life insurance trusts
- Children's trusts
- Defective grantor trusts
- Installment sales
- Limited liability companies
- Partnerships

Prior to joining Hopkins & Carley in 2010 she had been with Wilson Sonsini for 14 years.

#### **Hopkins & Carley**

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## Experience

- Advised a couple on estate planning and wealth management counsel with a focus on their two young children.
- Prior to a successful IPO, a couple made gifts to their children through custodial accounts. We “rolled up” the children’s accounts into a family limited partnership in order to invest their greatly appreciated assets efficiently. The limited partnership is now used as an investment vehicle for the entire family.
- Advised an executive of a public company with the transfer of assets to his children while also tending to his charitable interests. Through GRATs and gift trusts, he was able to minimize the tax implications of transferring assets to his children.

## Professional Activities

- El Camino Hospital Foundation Planned Giving Council
- Los Altos Community Foundation Planned Giving Council

## Bar Admissions

- State Bar of California (1994)
- State Bar of Hawaii (1995)

## Education

- J.D., Santa Clara University School of Law
- M.B.A. & B.A., Decisions and Information Sciences, Santa Clara University