Bruce B. Roberts

Of Counsel

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- **Services**
  - Family Wealth & Tax Planning
  - Trust & Estate Counseling

Overview

Bruce Roberts is a member of Hopkins & Carley's Family Wealth & Tax Planning Practice. High net worth individuals, landlords, owners of family and closely-held businesses, trustees, entrepreneurs and other professionals all over California have sought Bruce's counsel for more than 40 years.

His practice focuses on:

- Sophisticated income tax planning
- Gift and estate tax planning
- Estate planning
- Trust law
- Probate and trust administration
- Asset preservation
- Tax-effective wealth planning within the family unit
- Grantor Retained Annuity Trust ("GRAT")
- Qualified Personal Residence Trust ("QPRT")
- Irrevocable Life Insurance Trust ("ILIT")
- Charitable Lead Trust ("CLT")and Remainder Trust ("CRT")

Experience

- Advised senior family members how to transition their business to the next generation. Clients were facing a $25 million transfer tax to pass the business at death or during life. Using the “shifting opportunities” procedure, these clients saved nearly $21 million in net transfer taxes.
- Advised real estate owners how to transfer substantial equity without reassessment and at greatly reduced transfer tax expense.
- Advised investors with large portfolios how to transfer their wealth to future generations without incurring current income or gift tax while assuring that this wealth will not be subject to estate taxes for several generations.

Bar Admissions

- State Bar of Californi (1974)

Court Admissions

- U.S. Tax Court
- U.S. Court of Appeals for the Ninth Circuit
- All California state courts

Education

- J.D., Golden Gate University Law School
- M.B.A., Taxation, Golden Gate University
- B.S., University of California, Berkeley