

## Charles H. Packer

Shareholder

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- **Industries**

- Food & Beverage

- **Services**

- Family Wealth & Tax Planning
- Trust & Estate Counseling



## Overview

Chuck Packer is the Co-chair of Hopkins & Carley's Family Wealth & Tax Planning Practice. Chuck provides strategic counsel on estate, gift and philanthropic tax planning with a primary focus on issues concerning:

- Sophisticated wealth
- Estate planning
- Family business

*"He's...incredibly personable and easy to understand – for a sophisticated, technologically and technically advanced practitioner, clients love him because he can connect and understand. He's one of the best I've seen at balancing the technical skills with the client skills and connecting to people who aren't attorneys."*

— 2017 Chambers High Net Worth Guide

These issues often involve complex tax concerns with high-stakes consequences for high net worth individuals and families. Chuck's clients seeking his assistance, both throughout Northern California and beyond (including Europe and Australia), often remain with him from generation to generation.

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Chuck is recommended as a 'Leader in their Field' for Private Wealth in Chambers' High Net Worth Guide for 2016 and 2017.

In addition to his focus on trusts and estates, Chuck heads the Firm's legal services for the wine and viticulture industry.

## Experience

- Represented a family in the sale of their small, family-operated business to a large, publicly traded buyer for twice the amount of what had originally been offered, while transferring significant wealth to younger generations through pre-transaction planning.
- Advised a Bay Area telecommunications pioneer on a variety of business and wealth management matters, including a private family foundation and public charity, establishing an entity to own a condo in London and also assisted with household staff employment matters.
- Advised the founders and management team members of several high-profile Silicon Valley companies needing assistance with estate plans and wealth transfers to children and other family members. These transfers were designed and handled in a tax efficient manner prior to IPO or other liquidity events, resulting in significant wealth transfers a little or no tax cost to the transferor.

## Insights

### Publications

- California Continuing Education of the Bar, "Action Guide: Transferring Property Without Probate", Editor, 2012, 2014 and 2016

### Speaking Engagements

- Lecturer in the Graduate Tax Guest Speaker Series for the Master of Science in Taxation (MS Tax) program at the Orfalea College of Business California Polytechnic State University San Luis Obispo
- "Ask the Experts - Estate Planning for the Not so Rich and Famous," Santa Clara University Grand Reunion, Annually 2012 - 2016
- "Fundamentals Track - Essential Estate Planning Concepts: A Primer," 12th Annual Jerry A. Kasner Estate Planning Symposium, September 2016
- "Post-Heckerling - Pre-Kasner 2016 Estate Planning Update," Palo Alto Area Bar Association, January 2016; Financial Planning Forum, February 2016; Silicon Valley Bar Association, May 2016
- "Estate and Trust Planning 2015 Annual Update," Palo Alto Area Bar Association, January 2015; Santa Cruz County Estate Planning Council, February 2015; Financial Planning Forum, February 2015
- "Tax and Estate Planning with the Experts - Maximize Your Giving Potential while Still Taking Care of Loved Ones," Jewish Community Federation and Endowment Fund, October 2014
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"Ask the Experts – Estate planning for the Not so Rich and Famous," Santa Clara University Grand Reunion, 2012 - 2016

- "'Permanent' & 'Portable' Does Not Mean Simple Or Fixed In The World Of Trusts & Estates," Palo Alto Area Bar Association, January 2014; Santa Cruz County Estate Planning Council, March 2014; Financial Planning Forum, March 2014
- "Are We Moving Forward, Backward, or Mostly Just Standing Still?," Palo Alto Area Bar Association, January 2013; Financial Planning Forum, February 2013; Santa Cruz Estate Planning Council, March 2013
- "American Taxpayer Relief Act of 2012 ("ATRA")," Jewish Community Federation and Endowment Fund Peninsula Professional Advisors Network, January 2013
- "WHAT THE HECK? (Is Happening in the World of Trusts & Estates)," Palo Alto Area Bar Association, February 2012
- "What Are We Doing With Estate Planning in an Uncertain Environment: A Panel Discussion," AICPA National Conference on Tax Strategies for the High-Income Individual, May 2011
- "Integrating Philanthropy Into Your Client's Wealth Planning: Family Private Foundations," AICPA National Conference on Tax Strategies for the High-Income Individual, May 2011
- "Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010," Financial Planning Forum, April 2011
- "Estate Planning Update: How Good Can It Be If It's Only for Two Years?" Palo Alto Area Bar Association, February 2011
- "Ask the Experts: The Latest Tax and Estate Planning Developments and Strategies," Jewish Community Federation & Endowment Fund 14th Annual Tax and Estate Planning Seminar, November 2010
- "No Estate Tax, Some Basis, and a Lot of Confusion: What Should We Be Doing For Our Clients, Living and Deceased?" Palo Alto Area Bar Association, March 2010

## Professional Activities

- Jerry A. Kasner Estate Planning Symposium, Santa Clara University School of Law, Chair of the Planning Committee
- Jewish Community Federation & Endowment Fund, Chair of the Peninsula Professional Advisors Network
- Santa Clara University Planned Giving Advisory Council, Chair
- Recipient of Santa Clara University's Louis I. Bannan, S.J. Award, which recognizes an alumnus each year for their service to the Alumni Association and Santa Clara University, 2014
- Leukemia & Lymphoma Society Team in Training, Cycle Team Coach

## Bar Admissions

- State Bar of California (1981)

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## Court Admissions

- U.S. District Court for the Northern District of California
- U.S. Tax Court

## Education

- J.D., Santa Clara University School of Law
- M.B.A., Santa Clara University
- B.S., Social Ecology, University of California, Irvine