



## Jennifer D. Barcellos

### Senior Associate

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#### Practice Areas

Corporate Law | Real Estate | Taxation | Wealth Transfer

Jennifer Barcellos assists families and business owners in various areas of estate planning, trust administration, probate, business, real estate, and estate, gift, and income taxation. Clients trust that she will skillfully guide them through the legal complexities with compassion and empathy.

Jennifer works collaboratively with clients to meticulously craft comprehensive estate plans that pave the way for the success of future generations. Her adeptness extends to skillfully advising individuals and families throughout the intricacies of trust and probate administration. In addition, Jennifer provides insightful guidance on entity formation, management, and **real estate** transactions, all with a watchful eye to minimize **tax** liabilities.

Before practicing law as an attorney, Jennifer honed her skills as a trust, business, and tax paralegal for twelve years.

## Experience

- Assisted clients with tax planning strategies during a sale of a business with a low basis.
- Drafted various complex estate planning techniques, including irrevocable life insurance trusts, deferred sales trusts, non-grantor trusts, spousal lifetime access trusts, charitable trusts, minor's compromise trusts, and community and separate property trusts.
- Administered a \$100M trust administration.
- Drafted and assisted with various high-dollar Form 706 – Estate Tax Return filings with the Internal Revenue Service.
- Filed and negotiated various offer in compromise claims with the Internal Revenue Service.
- Assists surviving spouses with business succession and estate planning to minimize estate tax.
- Assists clients with probate administration.

## Professional & Community Service

- Member, Sacramento County Bar Association, Probate and Estate Section
- Member, California Lawyers Association, Trusts and Estates Section
- Member, California Young Lawyers Association
- Member, Sacramento Estate Planning Council

## Education

- J.D., Business and Tax Concentration, University of the Pacific, McGeorge School of Law, 2020
- B.A., Criminology and Justice Studies, California State University, San Marcos, 2011
- A.S., Paralegal Studies, Cuyamaca College, 2009

## Honors & Rankings

- *SacTown Magazine* (formerly *Sacramento Magazine*), Estate & Probate, 2024
- *Super Lawyers*, Northern California Rising Star, Estate & Probate, 2023-2024