



**ESTATE PLANNING  
INFORMATION ORGANIZER  
FOR SINGLE CLIENTS**

CLIENT NAME: \_\_\_\_\_

REFERRED BY: \_\_\_\_\_

*Return to:*

ROBERT F. DeMETER • JAMES Q. FISHER • DEAN I. FRIEDMAN  
CARRIE E. MILLER • ROBERT W. RENKEN



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**ESTATE PLANNING INFORMATION ORGANIZER**  
**CLIENT FAMILY INFORMATION**

**A. CLIENT**

1. FULL LEGAL NAME: \_\_\_\_\_

2. OTHER OR FORMER NAMES: \_\_\_\_\_

3. HOME ADDRESS: \_\_\_\_\_  
\_\_\_\_\_

4. EMAIL ADDRESS: \_\_\_\_\_

HOME TELEPHONE: \_\_\_\_\_ HOME FAX: \_\_\_\_\_

MOBILE TELEPHONE: \_\_\_\_\_ CITIZENSHIP: USA \_\_\_\_ Other \_\_\_\_\_

5. BIRTH DATE: \_\_\_\_\_ BIRTHPLACE: \_\_\_\_\_  
(e.g. January 1, 1959)

6. OCCUPATION OR POSITION, SALARY, AND EMPLOYER'S NAME AND ADDRESS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

OFFICE TELEPHONE: \_\_\_\_\_ OFFICE FAX: \_\_\_\_\_

MOBILE TELEPHONE: \_\_\_\_\_

7. OFFICE EMAIL ADDRESS: \_\_\_\_\_

8. DO YOU HAVE A SIGNIFICANT OTHER? Yes \_\_\_\_ No \_\_\_\_

9. ARE YOU PLANNING TO MARRY IN THE NEAR FUTURE? Yes \_\_\_\_ No \_\_\_\_

10. PARENTS, SIBLINGS, GRANDPARENTS (IF LIVING), OTHERS (IF RELEVANT)

FULL LEGAL NAME	RELATIONSHIP	CITY AND STATE	AGE
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

11. DATE OF PRESENT WILL \_\_\_\_\_ RESIDENCE THEN \_\_\_\_\_

12. HAVE YOU BEEN MARRIED BEFORE? Yes \_\_\_\_ No \_\_\_\_ (IF YES, GIVE FOR EACH PRIOR MARRIAGE PRIOR SPOUSE'S NAME.)

13. HAVE YOU EVER HAD CHILDREN? Yes \_\_\_\_ No \_\_\_\_ (IF YES, SEE PART B.)

14. SEND CORRESPONDENCE TO: \_\_\_\_\_  
\_\_\_\_\_

**B. CHILDREN AND GRANDCHILDREN**

1. CHILDREN (LIVING AND DECEASED) FROM PRIOR MARRIAGE(S)

NAME OF OTHER PARENT: \_\_\_\_\_

NAME	ADDRESS (IF DECEASED, SO INDICATE)	BIRTH DATE (e.g. January 1, 1979)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. CHILDREN'S SPOUSES

NAME OF CHILD	NAME OF SPOUSE
_____	_____
_____	_____

3. GRANDCHILDREN (LIVING AND DECEASED)

NAME	BIRTH DATE (e.g. January 1, 1979)	PARENT'S NAME
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**C. BANKING AFFILIATION**

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**D. PRINCIPAL INSURANCE AGENTS OR BROKERS**

1. LIFE INSURANCE (CONTACT, COMPANY, ADDRESS, PHONE)

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2. OTHER INSURANCE (TYPE OF INSURANCE, CONTACT, COMPANY, ADDRESS, PHONE)

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**E. ACCOUNTANT (CONTACT, COMPANY, ADDRESS, PHONE)**

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**F. INVESTMENT COUNSELOR, SECURITIES BROKER**

(CONTACT, COMPANY, ADDRESS, PHONE)

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**G. OTHER AGENTS, ADVISORS OR ATTORNEYS**

(CONTACT, COMPANY, ADDRESS, PHONE)

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## SELECTION OF ESTATE ADMINISTRATORS

<p>1. <b>Proposed executor:</b> (The Executor manages your probate estate - a short-term job.)</p>	1st Choice	
	2nd Choice	
	3rd Choice	
<p>2. <b>Proposed trustee:</b> (The Trustee manages property for as long as the trust lasts - a Trustee should be skilled in investing, recordkeeping and common sense or know how to employ people that have these qualities.)</p>	1st Choice	
	2nd Choice	
	3rd Choice	
<p>3. <b>Proposed guardian</b> [If you have minor children] (A guardian is responsible for the care and upbringing of your children.)</p>	1st Choice	
	2nd Choice	
	3rd Choice	
<p>4. <b>Proposed Agent for Durable Power of Attorney for Assets:</b> (Probably the same persons as the Trustee.)</p>	1st Choice	
	2nd Choice	
	3rd Choice	
<p>5. <b>Proposed Agent for (Durable Power of Attorney for Health Care) Advance Health Care Directive:</b> (This person makes health care decisions if you are unable to do so.)</p>	1st Choice	
	2nd Choice	
	3rd Choice	

Please provide the address and telephone number of each person named above as an Executor, Trustee, Guardian and Attorney-in-Fact:

NAME 1: \_\_\_\_\_

ADDRESS 1: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 1: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 2: \_\_\_\_\_

ADDRESS 2: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 2: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 3: \_\_\_\_\_

ADDRESS 3: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 3: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 4: \_\_\_\_\_

ADDRESS 4: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 4: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 5: \_\_\_\_\_

ADDRESS 5: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 5: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 6: \_\_\_\_\_

ADDRESS 6: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 6: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

Please provide the address and telephone number of each person named above as an Executor, Trustee, Guardian and Attorney-in-Fact:

NAME 7: \_\_\_\_\_

ADDRESS 7: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 7: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 8: \_\_\_\_\_

ADDRESS 8: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 8: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 9: \_\_\_\_\_

ADDRESS 9: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 9: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 10: \_\_\_\_\_

ADDRESS 10: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 10: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 11: \_\_\_\_\_

ADDRESS 11: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 11: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

NAME 12 \_\_\_\_\_

ADDRESS 12: \_\_\_\_\_

\_\_\_\_\_

TELEPHONE 12: (     ) \_\_\_\_\_ -- \_\_\_\_\_ EMAIL: \_\_\_\_\_

## CLIENT PROPERTY INFORMATION

(Attach Personal Financial Statement)

**A. BUSINESS INTERESTS** (Attach current Financial Statement for Business)

Name: \_\_\_\_\_ Nature of business: \_\_\_\_\_

Net Fair Market Value of Entire Business: \$\_\_\_\_\_ Determined by:  Client's Estimate  Buy-Sell Agreement  Book Value

Form of Business  Sole Proprietorship  Professional Corp. Number of Employees \_\_\_\_\_

Partnership/LLC  Sub-Chapter S. Corp. Full Time: \_\_\_\_\_

Corporation (Public)  Corporation (Private) Part Time: \_\_\_\_\_

Is There a Buy-Sell Agreement?  Yes (include copy or give details on back)  No

At Death, Business is to be:

- Continued by heirs
- Sold to surviving owners
- Sold to key employees
- Liquidated
- \_\_\_\_\_

Owners and Percentage Owned by Each:

Name	Age	% owned or # of Shares	Annual Income From Business	Ownership*	Amount Key Person Life Insurance
_____	_____	_____	\$_____	_____	\$_____
_____	_____	_____	\$_____	_____	\$_____
_____	_____	_____	\$_____	_____	\$_____

\*Ownership Key: Please use letter to indicate type of ownership:

- (a) Sole & Separate Property
- (b) Joint tenancy with \_\_\_\_\_
- (c) Tenancy in common
- (d) Tenancy by the entireties

Key Employees:

Name	Age	Position	Annual Salary	Amount Key Person Life Insurance
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____
_____	_____	_____	\$ _____	\$ _____

Include financial statements, tax returns for past 3 years and an inventory of business life insurance.

If financial statements are not available:

	Gross Sales	Net Profit (after taxes)
20__	\$ _____	\$ _____
20__	\$ _____	\$ _____
20__	\$ _____	\$ _____
20__	\$ _____	\$ _____

- FRINGE BENEFITS PROVIDED
- Qualified Pension or Profit Sharing Plan
  - Deferred Compensation
  - Split Dollar
  - Group Life Insurance
  - Long Term Disability Insurance
  - Health and Accident Insurance

ADDITIONAL BUSINESS INTERESTS (If substantial, complete a page for each business)

Name and Location	Nature of Business	Number of Employees	Corporation, Partnership/LLC or Sole Proprietorship?	Net Value of Entire Business	How Owned... Indicate Names of All Owners and Percentage Owned by Each
1. _____ _____	_____	_____	_____	_____	_____
2. _____ _____	_____	_____	_____	_____	_____
3. _____ _____	_____	_____	_____	_____	_____

## IRAs, PENSIONS and FRINGE BENEFITS

### B. QUALIFIED PENSION, PROFIT SHARING & KEOGH PLANS (Attach current statement)

	Owner (Employee)	Type of Retirement Plan (401K, Pension, Profit Sharing, Keogh, etc.)	Vested Account Value	Name of Employer	Beneficiaries
Retirement Plan - 1	_____	_____	_____	_____	_____
Retirement Plan - 2	_____	_____	_____	_____	_____
Retirement Plan - 3	_____	_____	_____	_____	_____
Retirement Plan - 4	_____	_____	_____	_____	_____

Life Insurance Held By Plan? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, which plan? \_\_\_\_\_ Death Benefit: \_\_\_\_\_

### C. INDIVIDUAL RETIREMENT ACCOUNTS

	Owner (Employee)	Type of IRA (Regular or Roth)	Account Value	Custodian of Account	Beneficiaries
IRA - 1	_____	_____	_____	_____	_____
IRA - 2	_____	_____	_____	_____	_____
IRA - 3	_____	_____	_____	_____	_____
IRA - 4	_____	_____	_____	_____	_____

**D. FRINGE BENEFITS** (Attach current statement)

	Owner	Number of Options Granted or Amount of Deferred Compensation	Number of Options Vested or Amount of Deferred Compen- sation Vested	Name of Employee	Contingent Beneficiaries
Deferred Compensation	_____	_____	_____	_____	_____
Incentive Stock Option	_____	_____	_____	_____	_____
Non-Qualified Stock Option	_____	_____	_____	_____	_____

**E. REAL ESTATE** – All real property in which you have an interest. (DO NOT INCLUDE REAL ESTATE VALUES WHICH HAVE BEEN REFLECTED IN THE VALUE OF OTHER ASSETS OR BUSINESS INTEREST.)

Address, Location and Description (i.e., residence, apartment, commercial, office, farm, industrial, hotel)	Year Acquired	Cost Basis	Fair Market Value	Mortgage (attach statement)	Ownership* (see below)	Other Owners and Percentage Owned by Each
1. _____  _____ (Residence)	_____	_____	_____	_____	_____	_____
2. _____  _____	_____	_____	_____	_____	_____	_____
3. _____  _____	_____	_____	_____	_____	_____	_____
4. _____  _____	_____	_____	_____	_____	_____	_____
5. _____  _____	_____	_____	_____	_____	_____	_____
6. _____  _____	_____	_____	_____	_____	_____	_____
7. _____  _____	_____	_____	_____	_____	_____	_____

\*Ownership Key: Please use letter to indicate type of ownership:

(a) Sole & Separate Property

(b) Joint tenancy with \_\_\_\_\_

(c) Tenancy in common

(d) Tenancy by the entireties

**F. RECEIVABLES** – Obligations - notes, mortgages, accounts receivable, etc., owed to you personally. (DO NOT INCLUDE INCOME OR ITEMS OWED TO A BUSINESS IN WHICH YOU HAVE AN INTEREST.)

Type of Receivable (e.g. Note, Trust Deed, Undocumented Loan)	Debtor	Balance	Ownership*
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____

**G. MISCELLANEOUS PERSONAL PROPERTY** – Other assets (automobiles, jewelry, household furniture and furnishings collections, etc.) owned by you.

Type of Personal Property	Fair Market Value	Ownership*
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____

\*Ownership Key: Please use letter to indicate type of ownership:

(a) Sole & Separate Property

(b) Joint tenancy with \_\_\_\_\_

(c) Tenancy in common

(d) Tenancy by the entireties

**H. CASH IN BANKS OR BROKERAGES** – All bank accounts (savings or checking) owned by you. (DO NOT LIST IRA OR PENSION ACCOUNTS, THESE SHOULD BE LISTED ON PAGE 9 “IRAs, PENSIONS AND FRINGE BENEFITS.” ALSO, DO NOT INCLUDE ACCOUNTS WHICH ARE REFLECTED IN BUSINESS INTERESTS OR OTHER ASSETS.)

	Type of Account (Attach Recent Account Statement)	Bank, S&L or Broker	Average Balance	Ownership*
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____
6.	_____	_____	_____	_____
7.	_____	_____	_____	_____
8.	_____	_____	_____	_____

\*Ownership Key: Please use letter to indicate type of ownership:

(a) Sole & Separate Property

(b) Joint tenancy with \_\_\_\_\_

(c) Tenancy in common

(d) Tenancy by the entirety

**I. BONDS** – All the current value of U.S. Bonds (Treasury Bonds, Treasury Notes, Treasury Bills) owned by you. List by type - do not list each individual bond.  
 (DO NOT LIST BONDS IN IRA OR PENSION ACCOUNTS; IRA AND PENSION ACCOUNTS SHOULD BE LISTED ON PAGE 9.)  
DO NOT INCLUDE ACCOUNTS WHICH ARE REFLECTED IN BUSINESS INTEREST OR OTHER ASSETS.

	Type of Bond, Note or Bill	Value	Ownership*
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____

\*Ownership Key: Please use letter to indicate type of ownership:

(a) Sole & Separate Property

(b) Joint tenancy with \_\_\_\_\_

(c) Tenancy in common

(d) Tenancy by the entireties

**J. SECURITIES** – All stock, bonds (other than U.S. Bonds, listed in Paragraph I above), Mutual Funds, Money Market Funds and other securities owned by you. (DO NOT LIST STOCK IN A CLOSELY HELD CORPORATION; THIS SHOULD BE INCLUDED UNDER “BUSINESS INTERESTS” ON PAGE 7) (DO NOT LIST IRA OR PENSION ACCOUNTS; IRA AND PENSION ACCOUNTS MUST BE LISTED ON PAGE 9.) DO NOT INCLUDE ACCOUNTS WHICH ARE REFLECTED IN BUSINESS INTERESTS OR OTHER ASSETS.

	Company (Attach copies of Share Certificates, if Available)	No. of Shares	Ownership*	Original Cost	Present Value Per Share	Total Present Value
1.	_____	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____	_____
5.	_____	_____	_____	_____	_____	_____
6.	_____	_____	_____	_____	_____	_____
7.	_____	_____	_____	_____	_____	_____

\*Ownership Key: Please use letter to indicate type of ownership:

(a) Sole & Separate Property

(b) Joint tenancy with \_\_\_\_\_

(c) Tenancy in common

(d) Tenancy by the entireties

**K. LIFE INSURANCE AND ANNUITIES** (Attach Annual Statement from Insurance Company)

Every life insurance policy (individual or group), annuity or supplementary contract in which you or a business in which you have an interest, is the insured, annuitant, assignee or beneficiary. Under "face amount" include the commuted value of any term riders. For "face amount" of annuity show current death benefit. Do not include disability or accidental death policies, and insurance in Qualified Plans listed in paragraph B, page 9.

Insured or Annuitant	Owner	Insurance Co. / Policy Number	Face Amount (including Riders)	Current Cash Value	Policy Loans	Primary Beneficiary	Secondary Beneficiary
1. _____	_____	_____ _____	_____	_____	_____	_____	_____
2. _____	_____	_____ _____	_____	_____	_____	_____	_____
3. _____	_____	_____ _____	_____	_____	_____	_____	_____
4. _____	_____	_____ _____	_____	_____	_____	_____	_____
5. _____	_____	_____ _____	_____	_____	_____	_____	_____
6. _____	_____	_____ _____	_____	_____	_____	_____	_____
7. _____	_____	_____ _____	_____	_____	_____	_____	_____

If any of the above is subject to a collateral assignment, or endorsement, indicate for each policy the amount of the loan listed in paragraph L below.

## L. LIABILITIES

Liabilities of you. Do not include any mortgages on real estate, life insurance policy loans, etc., that have already been listed, nor liabilities of a business in which you have an interest which was included in the business' valuation.

Type of Liability	Secured By	Amount	Creditor	How Payable and Due Date	Payable at Death?
1. _____	_____	_____	_____	_____	Yes / No
2. _____	_____	_____	_____	_____	Yes / No
3. _____	_____	_____	_____	_____	Yes / No
4. _____	_____	_____	_____	_____	Yes / No
5. _____	_____	_____	_____	_____	Yes / No
6. _____	_____	_____	_____	_____	Yes / No
7. _____	_____	_____	_____	_____	Yes / No
8. _____	_____	_____	_____	_____	Yes / No
9. _____	_____	_____	_____	_____	Yes / No



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## ROBERT F. DEMETER

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Bob DeMeter's practice focuses on business, tax and estate planning. He counsels clients on the formation, capitalization and reorganization of corporations, partnerships and limited liability companies. He is certified by the State Bar of California as a specialist in taxation law. Bob has represented companies of all sizes and from all sectors of the Southern California economy. He provides his clients with innovative corporate and tax savings ideas. He represents clients in tax controversies before the Internal Revenue Service, the California Franchise Tax Board, the State Board of Equalization and the Employment Development Department. He also counsels family business owners on estate planning and on successful transitioning of business ownership between generations.

Since 2005, Bob has been named every year a "Southern California Super Lawyer," representing the top 5% of practicing attorneys in Southern California, as selected by his peers in an extensive nomination and polling process conducted by *Law and Politics* and published in *Los Angeles Magazine*.

Before joining Clark & Trevithick, Bob was a shareholder of another prominent Los Angeles-based law firm where he served as co-chair of the business and real estate department. He graduated from the American University Law School in 1974 where he was an editor of the law review. Bob went on to receive a masters of law degree in taxation law from Georgetown University. While at Georgetown, Bob taught legal writing and research and was a graduate editor of *The Tax Lawyer*.

Bob has served as chair of the California Board of Legal Specialization of the California State Bar and its Taxation Law Advisory Commission. He is also a past member of the Board of Trustees of the Los Angeles County Bar Association and a member of the Executive Committee of the Taxation Section of the Los Angeles County Bar Association. He is a frequent speaker for professional and trade association organizations on tax, business and employee benefit topics. Email: [RDeMeter@clarktrev.com](mailto:RDeMeter@clarktrev.com)

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## JAMES Q. FISHER

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James Q. Fisher's practice focuses on customized gift and estate planning for individuals with medium or large estates. He prepares basic or sophisticated programs, from traditional wills and trusts to comprehensive wealth transfer documents. He also represents clients in business succession and asset preservation matters. He handles trust and estate administration, probate administration and tax issues (income tax, capital gains tax, property tax, gift tax, estate tax, and generation-skipping transfer tax). He is certified by the State Bar of California as a specialist in estate planning, trust and probate law.

Before joining Clark & Trevithick, Mr. Fisher worked for ten years as a sole practitioner. Prior to that, he practiced in Los Angeles area law firms for 27 years. He is a graduate of the University of Southern California School of Law and School of Letters, Arts and Sciences. Besides the State Bar of California, he is a member of the American Bar Association, the Los Angeles County Bar Association and the Beverly Hills Bar Association.

James Q. Fisher is a licensed California Real Estate Broker and a frequent speaker for professional and trade organizations on estate planning topics. Email: [JQFisher@clarktrev.com](mailto:JQFisher@clarktrev.com)

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## DEAN I. FRIEDMAN

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Dean Friedman joined Clark & Trevithick in 1988, specializing in a broad range of federal, state and local taxation law matters. His practice includes the representation of individuals, partnerships and corporations before the Internal Revenue Service, California Franchise Tax Board, State Board of Equalization and Employment Development Department. Dean advises clients on federal and state taxation planning for business acquisitions, reorganizations and sales.

Dean's practice also includes estate planning, trust and probate administration (with a special emphasis on the succession of closely-held business and investment interests). He consults on protective proceedings, including conservatorships and guardianships.

Dean earned his bachelor's degree from the University of Southern California, his law degree, cum laude, from Southwestern University and his masters of law from Georgetown University. He is certified by the California Board of Legal Specialization of the State Bar of California as a taxation law specialist.

Dean's professional affiliations include serving as past chairman and advisor of the California Board of Legal Specialization of the State Bar of California, as a member of the National Board of Directors, USC Marshall School of Business Alumni Association, and as a member of the Executive Committee of the Advisory Board of the California Museum of Science and Industry. He also writes and speaks on federal and state taxation and estate planning topics for the State Bar of California, the California Continuing Education of the Bar, the Los Angeles County Bar Association, the California Society of Certified Accountants and other professional organizations and publishers. Email: DFriedman@clarktrev.com

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## CARRIE E. MILLER

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Carrie Miller is an associate at Clark & Trevithick specializing in tax, estate planning and corporate law matters. Prior to joining the firm, Carrie practiced in the areas of estate planning and probate, as well as planned giving at a major educational institution.

She graduated from UCLA in 1993 with a bachelor's degree in Psychology, and completed a masters degree at Oklahoma State University in 1998. She earned her law degree from the University of California Hastings College of the Law in 2001, where she completed the Concentrated Studies in Taxation program and was a member of the *Constitutional Law Quarterly*. She is currently completing an L.L.M. in Taxation, with Honors, at Loyola Law School.

Carrie lives in South Pasadena with her husband. She enjoys being active in the community, yoga, cooking, architecture and historic preservation. She has been a Commissioner on the South Pasadena Cultural Heritage Commission since 2005, and the Chair of the Commission since 2006. Email: CMiller@clarktrev.com

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## ROBERT W. RENKEN

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Robert W. Renken, a shareholder of the firm, provides specialized estate planning and business succession expertise to entrepreneurs and closely held businesses. He represents clients operating in many industries, including real estate, technology, institutional fiduciaries, manufacturing, distribution and retail. A frequent speaker, Bob often addresses professional and trade organizations and conducts seminars on a variety of timely tax, business and estate planning topics.

He graduated from the University of the Pacific in 1987 with a Bachelors of Science degree in business administration, received his J.D. from Loyola Law School in 1992 and his Masters in Business Taxation from the University of Southern California in 1998. Mr. Renken was admitted to the California State Bar and the United States District Court for the Central District of California in 1992. He is a member of the California State Bar, the Los Angeles County Bar Association and the Taxation and Trust & Estates Sections of the State Bar. He is a director of the James J. Marino Memorial Foundation, a non-profit corporation formed to assist disadvantaged families in Southern California.

Bob is a native of the San Gabriel Valley where he and his family reside today. Email: [RRenken@clarktrev.com](mailto:RRenken@clarktrev.com)