



Theodore A. Hellman Partner

Ted has specialized in family wealth planning for more than 40 years. His practice includes estate planning, trust and probate administration, and planned charitable giving. Ted is often sought out to speak on estate planning and planned charitable giving techniques.

Ted's focus is on planning and drafting to achieve clients' personal estate planning and tax-saving objectives through creative and advanced planning solutions. He has particular expertise in planning with specialized trusts such as intentionally defective grantor trusts ("IDGTs"), grantor retained annuity trusts ("GRATs") and qualified personal residence trusts ("QPRTs"); in establishing family limited partnerships and limited liability companies for operational, discounting and business succession planning; in planning and implementing techniques to achieve charitable objectives.

Emanating from the personal nature of estate planning, Ted serves as a "family attorney" or advisor role for many clients. As such, he assists clients with personal and family issues, and also with business, real estate, litigation, and real and personal property issues that clients encounter in their daily and business lives.

Publications

"2010 Gap Year Gift Planning," *Family Wealth Planning Law Alert* (November 2010)

"Estate Tax and Generation-Skipping Transfer Tax Law," *Family Wealth Planning Law Alert* (January 2010)

"Estate and Transfer Tax Planning," *Inside the Minds: Trusts and Estates Legal Strategies: Leading Lawyers on Drafting an Estate Plan, Implementing Clients' Objectives, and Understanding Tax Complications*, Aspatore Books (Second Printing, 2009)

"Estate Planning and Transfer Tax Planning," chapter from *Inside Legal Minds: Trust and Estate Law Legal Strategies*, Aspatore Books (2007)

"Gifts Of Real Property to Public Charities," *The Marin Lawyer* (October 2006)

"QPRTs and GRATs," *The Marin Lawyer* (February 2005)

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Firm Leadership

Estate Planning & Administration
Section Leader

Practices/Industries

Family Wealth Planning
Tax
Financial Services

Presentations

"Planning and Drafting Revocable Trusts," moderator, California Continuing Education of the Bar

Honors & Awards

Best Lawyers in Northern California - Trust & Estates Law, Best Lawyers® (2019-2020)

Northern California Super Lawyers [2006–2018 (Top 100: 2007-2010)]

Chambers and Partners USA, Private Wealth Law

Best Lawyers in America®, Trusts and Estates (2008-2023)

Professional Affiliations

Marin County Bar Association, Estate Planning & Probate Section, Former Chair

Bar Association of San Francisco, Estate Planning, Probate and Trust Law Section, Former Chair

San Francisco Estate Planning Council

California Pacific Medical Center Foundation, Planned Giving Committee

State Bar of California, Estate Planning and Trust Law Section

Education

J.D., University of Virginia School of Law (1974)

M.A., Georgetown University (1971)

B.A., Yale University (1968)

Admissions and Courts

California