



**Jennifer F. Scharre** is a Senior Associate with Temmerman, Cilley & Kohlmann, LLP in San Jose, California. Mrs. Scharre's practice includes estate planning, estate administration, beneficiary representations, conservatorship matters and guardianship matters.

Her estate planning practice includes the preparation of revocable trusts, irrevocable trusts, and wills, as well as incapacity planning documents. Mrs. Scharre's trust and decedent's estate administration practice includes representation of trustees, personal representatives, and beneficiaries in all aspects of trust administration and probate including preparation of trust accountings and estate tax returns.

Mrs. Scharre's Accounting degree from the University of San Diego makes her uniquely equipped to assist clients in complex estate planning and estate administration. Ms. Scharre earned her J.D. degree from Santa Clara University School of Law.

Jennifer not only gives back to the legal community through speaking and presentations for professional organizations but also participates in her local community by providing informative presentations regarding estate planning, charitable giving, and special needs issues.

Mrs. Scharre will be teaching a Wills & Trusts course at Santa Clara School of Law in Spring of 2019 and Summer of 2019.

#### **Professional Organizations/Memberships:**

- Executive Committee Chair (2019), Silicon Valley Bar Association (SVBA)
- Education Co-Chair (2017, 2018), Silicon Valley Bar Association (SVBA)
- Member, State Bar of California, Estate Planning, Trust and Probate Section
- Member, Silicon Valley Bar Association (SVBA)

#### **Publications**

- Co-Author "2018 Legislation: From Transfer on Death Deeds to decanting, What a Year, What a Year!" California Trusts and Estates Quarterly, Volume 25, Issue 1, 2019
- Co-Author "The "Empty Chair": How To Account for the Rights of Contingent Remainder Beneficiaries in the Event of Incapacity" California Trusts and Estates Quarterly, Volume 24, Issue 4, 2018
- Co-Author, "2017 Legislation: From Planning to Partnerships, Principal and Income to Proofs of Service: a Plethora of Promulgated Principles Practitioners Must Practice Proficiently", California Trusts and Estates Quarterly, Volume 24, Issue 2, 2018
- Co-Author, "Don't Answer that! Spouses, Families, and Privilege", California Trusts and Estates Quarterly, Volume 23, Issue 4, 2017

## **Recent Lectures:**

- Speaker, “Property Tax Tips and Tricks” New Attorney Round Table, Silicon Valley Bar Association, San Jose, CA (4/10/2019)
- Speaker, “Busing the Bypass Trust: Endless Options?” Lawline (4/4/2019)
- Speaker, “New Ethical Rules, New Tax Law, and New Cases, OH MY!” California NAELA 2018 Summit, San Francisco, CA (3/2/2019)
- Speaker, “Trusts and Estates Legislative Updates” Lawline (2/4/2019)
- Speaker, “Trusts, Tax Returns, and the TCJA: Not Just a Tongue Twister” CalCPA SVSJ Trusts and Estates Group San Jose, CA (1/17/2019)
- Speaker, “Charitable Trusts” Trusts A to Z (NBI) San Jose, CA (12/12/2018)
- Speaker, “Other Trust Structures and Issues” Trusts A to Z (NBI) San Jose, CA (12/12/2018)
- Speaker, “Legal Ethics in Estate Administration” Estate Administration (NBI) Santa Clara, CA (11/29/2018)
- Speaker, “Business Interests in Estate Administration” Estate Administration (NBI) Santa Clara, CA (11/29/2018)
- Speaker, “Income Tax Returns” Estate Administration (NBI) Santa Clara, CA (11/29/2018)
- Panelist, “We’re Model Citizens Now: A Primer on California’s New Rules of Professional Conduct” Silicon Valley Bar Association, Santa Clara, CA (11/5/2018)
- Speaker, “We’re (Almost) Model Citizens Now” 42<sup>nd</sup> Annual Fall Program, California Lawyers Association, Trusts & Estates Section, San Francisco, CA (10/26/2018)
- Speaker, “What is a Meme?! – Ethics Rules and Social Media” The business of a Trust & Estates Practice, California Lawyers Association, Trusts & Estates Section, San Francisco, CA (6/29/2018)
- Speaker and Panelist, “Federal Estate Tax Issues” Santa Cruz County Estate Planning Council, Santa Cruz, CA (5/16/18)
- Speaker, “Post-Mortem Planning, Trust Administration, and Tax Hurdles” for Probate Boot Camp (NBI), San Jose, CA (5/10/18)
- Speaker, “Ethics” for Probate Boot Camp (NBI) San Jose, CA (5/10/18)
- Speaker and Panelist, “2017 Legislation Update”, California Lawyers Association, Trusts & Estates Section, Los Angeles, CA (4/18/2018)
- Speaker, “Recent Developments”, California NAELA 2018 Summit, San Diego, CA (2/2/18)
- Speaker, “2017 The Year of the Meme – And Some Other Fun Developments”, NAIFA (1/12/2018)
- Speaker, “Ethics in Estate Planning”, Lawline (1/11/2018)
- Speaker, “Special Needs Trusts and Tax Deduction with Trusts” for Trusts: The Ultimate Guide, National Business Institute (NBI) (12/14-15/2017)
- Speaker, “Fundamentals of Estate Planning”, Lawline (12/12/2017)
- Panelist, “Federal Estate Tax Issues” Silicon Valley Chapter of California Society of CPAs (11/8/2017)

- Speaker “Income Tax Returns and Business Interests in Estate Administration” for Estate Administration Boot Camp, National Business Institute (NBI), San Jose, CA (10/4-5/2017)