

# Estate Planning Attorney Profiles with LegalGUARD<sup>SM</sup>



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## Kern D. Singh



**Law Firm:** The Singh Law Firm, PC

**License:** CA - 2012

**School:** Political Science and Criminology at University of California, Irvine. Juris Doctorate from Monterey College of Law.

**Areas of Law:** Estate Planning: Wills & Trusts, Estate Tax Planning, Trust Administration, Living Wills, Power of Attorney

**Tidbits:** Mr. Singh has won many awards in Estate Planning, including but not limited to: Super Lawyers Rising Star which is a designation only awarded to the top 2.5% of attorneys, the Clients' Choice Award from AVVO year after year based on his experience, industry recognition, professionalism, and client feedback and the Who's Who Among Notable Alumni which is reserved for those professionals, executives and business owners who continue to make a difference in their fields.

## Benjamin J. Sowards, Esq.



**Law Firm:** Sowards Law Firm

**License:** CA - 2004

**School:** San Jose State University. Law school at U.C. Davis.

**Areas of Law:** Business, Trusts, Corporate and incorporation, Probate, Mergers and acquisitions

**Tidbits:** Mr. Sowards is an estate planning and wealth transfer attorney. He sets up estate plans, including living trusts, to help to avoid probate, minimize taxes and limit conflict. He also helps to settle out and administer trust and probate estates. He represents trustees to help them comply with the terms of the trust agreement and the California Probate Code. He minimizes conflict and lawsuits between trustees and beneficiaries or legal heirs. He also represents small and family owned businesses. He has saved his clients millions of dollars in probate fees and has successfully resolved several family conflicts that likely would have cost the trust hundreds of thousands of dollars.

## Cheri Michaelis



**Law Firm:** Cheri Michaelis Law

**License:** CA - 1995

**School:** UCLA and UC Hastings College of the Law

**Areas of Law:** Estate Planning, Trust Administration, Probate, Business Succession Planning, Real Property Transfers

**Tidbits:** The Law Offices of Cheri E. Michaelis provides comprehensive estate planning and wealth counseling services to clients throughout the Bay Area. Creating a customized estate plan to fit a client's specific needs can be a very complex and daunting task. Therefore, Cheri works diligently to create an effective and carefully crafted plan for all of her clients. She works with clients to parse out their wishes and help them reach their goals. Serving her community, Cheri is a proud member of the California State Bar Association, Santa Clara County Bar Association, Silicon Valley Bar Association, Santa Clara County Estate Planning Counsel, Business Networking International, San Jose Fit and Rotary Club of San Jose/Silicon Valley.

## Cynthia H. Lee, Esq.



**Law Firm:** American Trust Institute

**License:** CA - 2001

**School:** University of San Diego School of Law

**Areas of Law:** Estate Planning and administration, trusts, and wealth preservation planning

**Tidbits:** Cynthia Lee, Esq. has been focused in the area of estate planning and administration since 2001. Her estate planning practice includes the design and implementation of estate tax "freezing" and valuation reduction techniques, revocable and irrevocable trusts, trusts for minors, life insurance trusts, family partnerships, personal residence trusts, and various forms of family and charitable gifts. Ms. Lee continues her education by frequently attending California Continuing Education of the Bar seminars in areas of the law relating to estate planning, charitable planning and other relevant topics. Ms. Lee is fluent in Cantonese and conversant in Mandarin.

## Daniel L. Sheehan



**Law Firm:** Silicon Valley Wealth Law

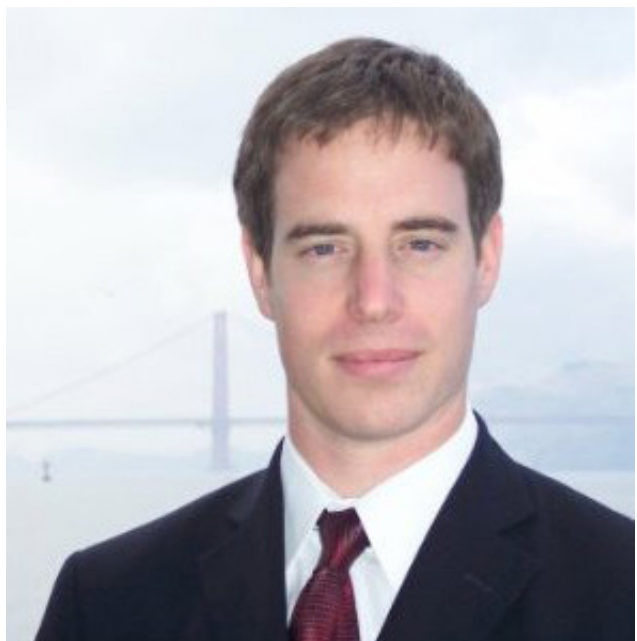
**License:** CA - 1995

**School:** St. Mary's College and University of San Francisco School of Law

**Areas of Law:** Estate Planning, special needs planning, trusts

**Tidbits:** Attorney Daniel L. Sheehan is dedicated to providing highly personalized, caring and comprehensive estate planning counsel to individuals, couples, families and businesses. As the founder of Silicon Valley Wealth Law in Menlo Park, Dan is dedicated to personal service, and as a member of Wealth Counsel, prides himself on taking estate planning to a whole new level. He likes to meet with clients for between 90 minutes and two hours, listening closely to them, learning about their families, their finances, who they love and what they own. He makes a special effort to find out their goals and values before customizing an estate plan just for them.

## Doron Ohel, Esq.



**Law Firm:** Law Offices of Doron Ohel

**License:** CA - 2002

**School:** U.C. Santa Barbara and University of San Diego School of Law

**Areas of Law:** Estate Planning, litigation, mediation

**Tidbits:** He is fluent in Hebrew and conversational in Japanese. Doron is an attorney with a decade of experience engaging in estate planning for numerous domestic and international clients. He enjoys client interaction and finding creative solutions to various legal problems. As a committed member of the local community and legal profession, Doron and his staff are ready to help you in a professional and results driven manner. Many clients enjoy the ease and friendliness of drafting their estate plan with the Law Offices of Doron Ohel.

## Einat Arbel



**Law Firm:** Law Office of Einat Arbel

**License:** Israel - 2002, CA - 2006

**School:** Haifa University in Israel and Academic College of Law in Israel

**Areas of Law:** Estate planning, living trusts, power of attorney, healthcare directives, specializes in international clients

**Tidbits:** Einat is fluent in Hebrew and English. She understands the challenges of estate planning for international clients who have assets and families abroad and customizes the estate plan according to the personal needs of the client. Einat is a member of the Israeli Bar Association (inactive), the California Bar Association, the San Mateo Bar Association - Trust and Estate Section and the Silicon Valley Bar Association.

## Genis Lin, P.C.



**Law Firm:** Genis Lin

**License:** CA - 2000

**School:** National Taiwan University, Boston University, Law Degree from UC Davis

**Areas of Law:** Estate Planning, administrative law, trusts, probate, wills and living wills, bankruptcy

**Tidbits:** Speaks Taiwanese.

## Lalit Kundani



**Law Firm:** Kundani & Chang, LLP

**License:** CA - 2005

**School:** UCLA and UC Berkeley School of Law

**Areas of Law:** Trusts, criminal defense, personal injury, estate planning

**Tidbits:** Lalit Kundani is a trial attorney, former prosecutor, and legal commentator. Since co-founding Kundani & Chang LLP, Mr. Kundani focuses his practice on criminal defense, personal injury, and business and estate planning.

A former Deputy District Attorney with the Los Angeles County District Attorney's Office, Mr. Kundani prosecuted a number of high-profile cases including those garnering international headlines. Mr. Kundani tried numerous jury trials to verdict, including murders, gang-related shootings, kidnappings, and robberies, with an impressive felony conviction rate of 97%. His accomplishments earned him accolades from various law enforcement agencies including the Federal Bureau of Investigation and the United States Department of Defense.

## Lily Huang



**Law Firm:** Law Office of Lily L. Huang

**License:** CA - 2011

**School:** Vanderbilt University School of Law, The School of Law at Queen Mary, University of London

**Areas of Law:** Financial and estate planning, family law, divorce, probate

**Tidbits:** Lily Huang speaks Cantonese, Mandarin, and German. Attorney Lily L. Huang is the founding and principal lawyer at the Law Office of Lily L. Huang, located in San Jose, California. She has an advanced degree in tax law in addition to her juris doctorate. She also holds an accounting certificate. Attorney Huang uses extensive experience as an attorney and in-depth knowledge of finance and tax to handle even the most complex and sophisticated family law, estate planning and probate matters.

## Peter Robert Stone, APC



**Law Firm:** Law Office of Peter Stone

**License:** CA - 1992

**School:** BA from UC Santa Barbara, Pacific McGeorge School of Law

**Areas of Law:** Personal injury, wills, trusts, estate planning, litigation

**Tidbits:** Mr. Peter Stone been serving California in personal injury and estate planning & trusts since 1992. Stone was the research attorney for the Yolo Superior Court.

## Victoria Li



**Law Firm:** The Victoria Law Offices

**License:** CA - 2007

**School:** Lincoln Law School and an advanced law degree from Golden Gate University

**Areas of Law:** Estate Planning, taxation, probate, wills, trusts, bankruptcy, elder law

**Tidbits:** Speaks Mandarin. Attorney Victoria Li is a well-known estate planning attorney with more than 12 years of legal experience in the estate, probate, wills and trusts. Victoria is currently well-known among engineers in the high-tech companies in the bay area, California.

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**Spouse or  
domestic  
partner**

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accredited university

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### AUTO & TRAFFIC

Traffic defense (resulting in suspension or revocation of license), License Suspension (Administrative proceeding), Traffic ticket defense<sup>4</sup>



### FINANCIAL & CONSUMER

Debt collection: pre-litigation defense & trial defense, Bankruptcy (chapter 7 or 13), Tax audits, Document preparation, Consumer dispute, Small claims court<sup>1</sup>, Identity Theft Assistance<sup>3</sup>, Savings Assistance<sup>3</sup>



### FAMILY

Separation<sup>1</sup>, Divorce<sup>1,2</sup>, Name change, Guardianship/conservatorship<sup>1</sup>, Adoptions<sup>1</sup>, Juvenile court proceedings, Elder law<sup>3</sup>, Immigration<sup>3</sup>, Preparation of Prenuptial Agreement<sup>4</sup>



### ESTATE PLANNING & WILLS

Will or codicil, Complex will<sup>4</sup>, Living will or Health Care Power of Attorney, Probate of small estate<sup>1</sup>, Living trust document



### GENERAL

Civil litigation defense, Initial law office consultation<sup>1</sup>, Review of simple documents<sup>1</sup>, Mediation<sup>3</sup>

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<sup>1</sup>Limitations apply

<sup>2</sup>Subject to Managed Case Rules

<sup>3</sup>Additional Benefits

<sup>4</sup>Discounted Fees or Flat Rates



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Limitations and exclusions apply. This benefit summary is intended only to highlight benefits and should not be relied upon to fully determine coverage. More complete descriptions of benefits and the terms under which they are provided are received upon enrolling in the plan. Group legal plans are administered by Legal Access Plans, L.L.C. or LegalEASE Home Office: 5850 San Felipe, Suite 600, Houston, TX. This legal plan may not be regulated as insurance in some states, but is available in all states. Underwritten by Virginia Surety Company in all states except where underwriting is not required but the product is available. Please contact LegalEASE for complete details.