Sideman & Bancroft

JAMES B. ELLIS, Partner

Tax and Estate Planning

DESCRIPTION OF PRACTICE

Jim Ellis specializes in tax, estate planning, charitable giving, and trust and estate administration for wealthy individuals and families. His experience includes advising corporate and individual fiduciaries of trusts and estates, and senior executives of family offices. He has a particular expertise with founders of successful business ventures, and with executives of public corporations.

Mr. Ellis began his law practice in 1979. He recently spent 12 years with the JPMorgan Private Bank, working with specialists handling investing, lending, trust administration, philanthropic services, and wealth transfer planning for ultra high net worth individuals. His experience spans the full array of wealth transfer and estate planning techniques appropriate for wealthy families, from the simple to the truly complex. He has spent significant time planning for transfers of compensatory stock options and restricted stock, private company equity in advance of M & A transactions and IPOs, interests in private investment funds, and structured financial instruments, as well as for transfers of traditional private business interests and investment portfolios. His trust and estate administration experience includes a focus on modern fiduciary duties imposed when constructing and administering investment portfolios. He has also focused on intra-state trust planning, with an eye to reducing the burden of state level fiduciary income tax as well as state death taxes.

Prior to joining Sideman & Bancroft LLP, Mr. Ellis was a partner with McCutchen, Doyle, Brown & Enersen, and a managing director at the JPMorgan Private Bank.

PROFESSIONAL INVOLVEMENT

Mr. Ellis is a Fellow of the American College of Trust and Estate Counsel. He is a past chair of the Trust and Estate Section of the California Bar, and was a member of the Section's Executive Committee for ten years. He is a past Editor of the *California Trusts and Estates Quarterly*.

Mr. Ellis has spoken before many professional organizations on tax and estate planning, including the American College of Trust and Estate Counsel, The State Bars of California and New York, the American Institute of Certified Public Accountants, The American Bar Association Tax Section, the American Law Institute/American Bar Association, the U.S.C. Tax Institute, and the California Continuing Education of the Bar. His technical articles have been widely published.

Listed in *Northern California Super Lawyers*®: 2005, 2006, 2007, 2008.

EDUCATION

B.S., Michigan State University, 1970, with honors

J.D., Indiana University School of Law, 1979, magna cum laude
Order of the Coif

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