

THOMAS A. JACOBSEN, CLPF

The vast majority of Licensed Professional Fiduciaries practice primarily in the conservatorship role. Many have limited experience and training with Trust and financial matters. Very few bring Tom's combination of training, knowledge, experience and judgment:

- 18 years experience as a trustee
- 25 years of successful investment experience
- highly credentialed with Masters Degrees in both Taxation and Business Management
- over 30 years as a practicing CPA, providing tax and accounting services to over 200 trust clients and over 100 estate clients
- well versed in the Prudent Investor rules as required by the California Probate Code
- well versed in the California Probate Code requirements for fiduciary accounting and all aspects of trust and estate administration
- over 200 hours of continuing professional education in trust administration, fiduciary accounting, exemption trust and marital trust funding, planning with and operation of charitable remainder and charitable lead trusts, use of trusts of all kinds in estate planning, preparation of the federal Estate Tax and other returns
- experience as trustee with life insurance and charitable trusts
- 25 years of membership in the Marin County Estate Planning Council (including current service on the Board of Directors)

His unique ability to see and understand the entire picture, both large and small, helps assure clients the recommendations and decisions best suited to their individual situation.