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## Sophisticated Trust and Estate Firm is Greater Than the Sum of Its Parts

**W**hen it comes to complex estate planning, trust administration, and trust and estate litigation, few Northern California firms are as well-equipped as Hartog Baer Hand to handle the challenges its clients face.

“Clients look to our collective knowledge to resolve complexities they were not anticipating,” says principal attorney John Hartog, whose practice emphasizes estate planning, trust and probate administration, and litigation.

Team members draw on each other’s niche proficiencies to craft strategies for each client’s situation—whether planning the will of a successful entrepreneur, executing the will of a deceased parent, settling a dispute between siblings over a will poorly assembled by another firm, or mitigating other complicated scenarios involving families, colleges, hospitals, or nonprofit organizations.

“Our litigators, for example, routinely consult our estate planners before resolving a dispute so it may be resolved in a tax-efficient manner,” says principal David Baer, who has three decades of experience in complex litigation. “This allows our clients to avoid the disadvantageous tax consequences of a poorly structured settlement.”

### Caring for Clients

While providing advanced legal acumen, the attorneys of Hartog Baer Hand never forget that their roles also involve a human element.

“It’s not just about the numbers; it’s about getting people through a hard time,” says Hartog.

“It begins with truly listening to clients describe the context

of their situation,” says principal Margaret Hand, who brings to her estate planning practice the wisdom she has gained representing clients in probate proceedings, conservatorships, trust administrations, and trust and estate litigation.

“I’m personally proud of the work I do with couples who have children from previous marriages. I help them understand that their conflicts are normal. It’s very gratifying when clients can hand over their burdens to us.”

The firm often receives referrals from opposing counsel—a true testament to the team’s respected reputation and highly effective approach.

“Clients appreciate that we have all the discipline, knowledge, and experience of a big-city firm in San Francisco, but we offer a more user-friendly suburban environment,” says Baer.



### Appreciative Words from Clients

**“It’s not easy to convey the deep appreciation we feel for all of your help and guidance.”**

—Conservators

**“Thank you so very much for helping us through this difficult time.”**

—Family of a murder victim

**“You’re a natural teacher!”**

—Estate planning client



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