Charles H. Packer

Shareholder

cpacker@hopkinscarley.com
Phone: 408.299.1467

- **Industries**
  - Food & Beverage

- **Services**
  - Family Wealth & Tax Planning
  - Trust & Estate Counseling

Overview

Chuck Packer provides thoughtful and strategic counsel on estate, gift and philanthropic tax planning with a leading focus on essential issues important to prominent and high net worth individuals and families. His influential list of clients trust him with their most important and complex tax concerns involving high-stakes consequences. Chuck's practice and expertise includes actions in Northern California and beyond, including Europe, Asia, India and Australia. His clients are long term, some from generation to generation.

"He's…incredibly personable and easy to understand – for a sophisticated, technologically and technically advanced practitioner, clients love him because he can connect and understand. He's one of the best I've seen at balancing the technical skills with the client skills and connecting to people who aren't attorneys."

— 2017 *Chambers High Net Worth Guide*

Chuck's practice includes all aspects of:

- Wealth transfer planning for sophisticated assets and wealth
- Estate planning
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- Family business

As a prominent Hopkins & Carley Shareholder, a former leader of the Firm's Family Wealth & Tax Planning Practice and a former member of the Firm's Executive (Management) Committee, Chuck understands business imperatives. In 2006, Chuck opened the Firm's Palo Alto Office (now in Redwood City) and was responsible for growing its Family Wealth & Tax Planning Practice into the largest in Northern California.

In addition to Chuck's legal acumen, he has been, and continues to be, recognized as a 'Leader in their Field' for Private Wealth in *Chambers' High Net Worth Guide* (2016-2023). Additionally, Chuck has been elected a Fellow of the American College of Trust & Estate Counsel (ACTEC), a prestigious national peer recognition association. Every year since 2021, Chuck has been selected by his peers for inclusion in *The Best Lawyers in Northern California*™ in the field of Trusts & Estates Law.

Experience

- Represented a family in the sale of their small, family-operated business to a large, publicly traded buyer for twice the amount of what had originally been offered, while transferring significant wealth to younger generations through pre-transaction planning.
- Advised a Bay Area telecommunications pioneer on a variety of business and wealth management matters, including a private family foundation and public charity, establishing an entity to own a condo in London and also assisted with household staff employment matters.
- Advised the founders and management team members of several high-profile Silicon Valley companies needing assistance with estate plans and wealth transfers to children and other family members. These transfers were designed and handled in a tax efficient manner prior to IPO or other liquidity events, resulting in significant wealth transfers at little or no tax cost to the transferor.

Insights

Publications

- California Continuing Education of the Bar, "Action Guide: Transferring Property Without Probate", Editor, 2012, 2014 and 2018

Speaking Engagements

- Lecturer in the Graduate Tax Guest Speaker Series for the Master of Science in Taxation (MS Tax) program at the Orfalea College of Business California Polytechnic State University San Luis Obispo, 2016-
- "Heck Yes, We Went, We Saw, We Report Back from the 58th Heckerling Institute" (aka 2024 Heckerling Update), Santa Clara Estate Planning Council, January 2024; San Mateo County Bar Association & Silicon Valley Bar Association, February 2024

- “A Review of Estate Planning Concepts,” San Jose State University Heritage Society Luncheon, November 2023
- “Who's The Fiduciary?” Panelist at 19th Annual Jerry A. Kasner Estate Planning Symposium, October 2023
- “Heckerling 2023 Update (+ Post-Heckerling Developments) – Back, Live in Sunny Florida but Still Virtual from a Distance,” San Mateo County Bar Association, February 2023; Silicon Valley Bar Association, March 2023
- “Appraisals for the IRS, ” Appraisal Institute, Northern California Chapter, 2021 Annual Fall Conference (virtual), October 2021
- “What a Long, Strange Trip Its Been: From Heckerling in Sunny Florida in January 2020 to Virtual Heckerling in 2021” (aka Post Heckerling – Pre Kasner 2021), Silicon Valley Bar Association (virtual), May 2021
- “IRS, Loss, Gift & Estate Valuation,” Appraisal Institute, Northern California Chapter, 2020 Annual Fall Conference (virtual), September 2020
- “Heckerling 2020 Update (+ Post-Heckerling Developments),” Silicon Valley Bar Association, February 2020; San Mateo County Bar Association, February 2020
- “Heckerling Continues – Despite Government Shutdown) (aka “Post Heckerling – Pre Kasner 2019”),” Palo Alto Area Bar Association, February 2019; Santa Cruz County Estate Planning Council, February 2019; San Mateo County Bar Association & Peninsula Estate Planning Council, February 2019; Silicon Valley Bar Association, March 2019
- “Post Heckerling – Pre Kasner 2018,” Palo Alto Area Bar Association, February 2018; San Mateo County Bar Association & Peninsula Estate Planning Council, February 2018; ABA RPTE Business Planning Committee Conference Call, February 2018; Silicon Valley Bar Association, March 2018
- “What the Heckerling Just Happened (aka “Post Heckerling – Pre Kasner 2017”),” Palo Alto Area Bar Association, January 2017; Santa Cruz County Estate Planning Council, February 2017; San Mateo County Bar Association & Peninsula Estate Planning Council, February 2017; Peninsula Financial Planning Forum, February 2017; Silicon Valley Bar Association, March 2017
- “Ask the Experts – Estate Planning for the Not so Rich and Famous,” Santa Clara University Grand Reunion, Annually 2012 - 2016
- “Fundamentals Track – Essential Estate Planning Concepts: A Primer,” 12th Annual Jerry A. Kasner Estate Planning Symposium, September 2016
- “Post-Heckerling – Pre-Kasner 2016 Estate Planning Update,” Palo Alto Area Bar Association, January 2016; Financial Planning Forum, February 2016; Silicon Valley Bar Association, May 2016
- “Estate and Trust Planning 2015 Annual Update,” Palo Alto Area Bar Association, January 2015; Santa Cruz County Estate Planning Council, February 2015; Financial Planning Forum, February 2015
- “Tax and Estate Planning with the Experts – Maximize Your Giving Potential while Still Taking Care of Loved Ones,” Jewish Community Federation and Endowment Fund, October 2014
- "‘Permanent’ & ‘Portable’ Does Not Mean Simple Or Fixed In The World Of Trusts & Estates,” Palo Alto Area Bar Association, January 2014; Santa Cruz County Estate Planning Council, March 2014; Financial Planning Forum, March 2014
- “Are We Moving Forward, Backward, or Mostly Just Standing Still?,” Palo Alto Area Bar Association, January 2013; Financial Planning Forum, February 2013; Santa Cruz Estate Planning Council, March 2013
- “American Taxpayer Relief Act of 2012 (“ATRA”),” Jewish Community Federation and Endowment Fund Peninsula Professional Advisors Network, January 2013
- “WHAT THE HECK? (Is Happening in the World of Trusts & Estates),” Palo Alto Area Bar Association, February 2012

- “What Are We Doing With Estate Planning in an Uncertain Environment: A Panel Discussion,” AICPA National Conference on Tax Strategies for the High-Income Individual, May 2011
- “Integrating Philanthropy Into Your Client’s Wealth Planning: Family Private Foundations,” AICPA National Conference on Tax Strategies for the High-Income Individual, May 2011
- “Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010,” Financial Planning Forum, April 2011
- “Estate Planning Update: How Good Can It Be If It’s Only for Two Years?” Palo Alto Area Bar Association, February 2011
- “Ask the Experts: The Latest Tax and Estate Planning Developments and Strategies,” Jewish Community Federation & Endowment Fund 14th Annual Tax and Estate Planning Seminar, November 2010
- “No Estate Tax, Some Basis, and a Lot of Confusion: What Should We Be Doing For Our Clients, Living and Deceased?” Palo Alto Area Bar Association, March 2010

Professional Activities

- Jerry A. Kasner Estate Planning Symposium, Santa Clara University School of Law, Chair of the Symposium Planning Committee
- American College of Trust & Estate Counsel (ACTEC), Fellow
- Jewish Community Federation & Endowment Fund, Chair of the Peninsula Advisors’ Network
- Catholic Community Foundation of Santa Clara County, Advisory Board Member
- Santa Clara University Planned Giving Advisory Council, Chair
- Recipient of Santa Clara University’s Louis I. Bannan, S.J. Award, which recognizes an alumnus each year for their service to the Alumni Association and Santa Clara University, 2014
- Leukemia & Lymphoma Society *Team in Training*, Cycle Team Coach

Bar Admissions

- State Bar of Californi (1981)

Court Admissions

- U.S. Tax Court
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U.S. District Court for the Northern District of California

Education

- J.D., Santa Clara University School of Law
- M.B.A., Santa Clara University
- B.S., Social Ecology, University of California, Irvine