Daniel C. David | PARTNER

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Mr. David is one of the top tax and estate planning attorneys on the Central Coast. He also has substantial experience and expertise advising U.S. clients on wealth preservation, trust and estate administration and real estate, finance and business transactions, and advising foreign clients on structuring inbound purchases and investments and U.S. estate and gift tax planning.

Mr. David is well versed in all aspects of advanced estate and gift tax planning. The primary focus of his estate planning practice, however, is advising clients on personal family issues, including assisting with clients' philanthropic goals, helping to educate heirs about legal and financial matters, establishing trusts to create incentives for heirs to be self-sufficient, protecting family assets from heirs' creditors (including potential future ex-spouses) and providing tools to trustees to deal with substance abuse issues.

Before moving to Santa Barbara from Los Angeles in 1999, Mr. David's practice included representing clients in real estate and corporate equity and debt financings. As a result of his knowledge of finance and capital markets, he has a unique ability to work with clients' money managers to ensure that financial risk is being adequately assessed and addressed.

Mr. David's career accomplishments include acting as California counsel for the Commercial Lending Division of Bank of New York, and, in 2006, requiring changes to the standard escrow terms under the Master Derivatives Agreement then used by investment banks in diversification transactions involving concentrated stock positions. These changes avoided the risk of losing over $70 million of a client's stock from investment bank bankruptcies during the 2008-2009 financial crisis.

Mr. David received his B.A. with High Honors and a Master's Degree in Environmental Science from the University of Virginia. He went on to receive his law degree in 1983 from the University of California, Berkeley School of Law (Boalt Hall). He started practicing law as a tax attorney in the Tax Department of the international law firm of Loeb and Loeb, which was at the time one of the preeminent Tax Departments in the country.

PRACTICE AREAS

Probate and Trust Administration
Tax
Estate Planning
Real Estate
Business
Corporate

ADMISSIONS

State Bar of California, 1983

EDUCATION

University of California, Berkeley (Boalt Hall), J.D., 1983
University of Virginia, M.S., 1980
University of Virginia, B.A., 1978