

Snell & Wilmer



Charles W. Daff

Associate | Orange County

Tel. 714.427.7010

cdaff@swlaw.com

Main Bio

Charles Daff is a Certified Specialist in Estate Planning, Trust, and Probate Law, California Board of Legal Specialization. He is an associate in the firm's Private Client Services group. Charles' practice focuses on tax, trusts, and estates with an emphasis in estate planning, trust and probate administration, charitable planning, and estate and gift taxation.

Education

- University of California, Irvine School of Law (J.D., 2013)
 - Senior Editor, UC Irvine Law Review (2013)
 - Lead Article Editor, UC Irvine Law Review (2012)
- University of California, Santa Barbara (B.A., Business/Economics with Emphasis in Accounting, 2009)

Professional Memberships & Activities

- California Lawyer's Association (2014-present)
 - Trusts and Estates Section
 - Law Practice Management and Technology Section
- Orange County Bar Association (2014-present)
 - Trusts and Estates Section
- Napa County Bar Association (2016-2017)
 - Trusts and Estates Section
- Napa County Bar Association, Young Lawyers Division (2016-2017)
 - Vice President
 - Co-MCLE Chair

Representative Presentations & Publications

- "Special Planning for Special People, A Conversation About Special Needs Trusts," Presenter, The Shea Center for Therapeutic Riding, San Juan Capistrano, CA (October 10, 2019)
- "Tips of the Trade: The Formula General Power of Appointment: Guaranteed Efficiency Between Estate Tax Planning and Income Tax Basis," Co-Author, California Trusts and Estates Quarterly,

Volume 25, Issue 3 (2019)

- "Marital Deduction: Overview and Formula Clauses," Contributing Author, CEB California Will Drafting (July 2019)
- "Marital Deduction Power of Appointment Trusts," Contributing Author, CEB California Will Drafting (July 2019)
- "Qualified Terminable Interest Property Trusts and Qualified Domestic Trusts," Contributing Author, CEB California Will Drafting (July 2019)
- "Bypass Trusts and Disclaimer Trusts," Contributing Author, CEB California Will Drafting (July 2019)
- "Marshalling and Valuing Assets," Presenter, National Business Institute Probate Boot Camp, Santa Ana, CA (June 19, 2019)
- "Handling Debts and Creditors Claims," Presenter, National Business Institute Probate Boot Camp, Santa Ana, CA (June 19, 2019)
- "Top 10 Things Estate Planners Need to Know About Planning for Retirement Assets," Co-Presenter, CEB Webinar (February 27, 2019)
- "Ethical Considerations," Contributing Author, CEB California Estate Planning (January 2019)
- "Marital Deduction Planning," Contributing Author, CEB California Estate Planning (January 2019)
- "Marital Deduction: Overview and Formula Clauses," Contributing Author, CEB California Will Drafting (August 2018)
- "Qualified Terminable Interest Property Trusts and Qualified Domestic Trusts," Contributing Author, CEB California Will Drafting (August 2018)
- "Bypass Trusts and Disclaimer Trusts," Contributing Author, CEB California Will Drafting (August 2018)
- "[Not in the Family: When to Name a Corporate Trustee](#)," Author, Financial Planning Association (June 2015)

Community Involvement

- The Shea Center for Therapeutic Riding (2018-present)

Other Professional Experience

- Associate, Dorsey & Whitney (2018-2019)
- Associate, Gaw Van Male (2017-2018)
- Associate, Estate Plan, Inc. (2014, 2016-2017)
- Trust Administrative Office II, U.S. Trust, Bank of America Private Wealth Management (2015-2016)
- Research Assistant for California Monitor of the National Mortgage Settlement, Katherine Porter, University of California, Irvine School of Law (2012)
- Judicial Extern to the Hon. Meredith A. Jury (2012)
- Judicial Extern to the Hon. Scott C. Clarkson (2012)
- Intern, United States Department of Justice, Office of the United States Trustee (2011)

Bar Admissions

- California