

# Snell & Wilmer

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## Charles W. Daff

Senior Attorney | Orange County

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## Main Bio

Charles Daff is a Certified Specialist in Estate Planning, Trust, and Probate Law, California Board of Legal Specialization. He is a senior attorney 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.)
  - UC Irvine Law Review, Senior Editor
  - UC Irvine Law Review, Lead Article Editor
- University of California, Santa Barbara (B.A., Business/Economics with Emphasis in Accounting)

## 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
- California Society of CPAs, Estate Planning Interest Group (2019-2020)
  - Co-Chair
- 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

- "Qualified Terminable Interest Property Trusts and Qualified Domestic Trusts" (Chapter 19), Update Author, CEB California Will Drafting (May 2023)

- “Bypass Trusts and Disclaimer Trusts” (Chapter 20), Update Author, CEB California Will Drafting (May 2023)
- “New Software Tools for Practicing Intellectual Property,” Panelist, The IPR Gorilla Conference (May 2022)
- “Trustee Compensation, Attorney Fees, and Other Administrative Costs” (Chapter 9), Update Author, CEB California Trust Administration (November 2020)
- “Principal and Income” (Chapter 8), Update Author, CEB California Trust Administration (November 2020)
- “The Formula General Power of Appointment: Guaranteed Efficiency Between Estate Tax Planning and Step-up in Basis,” Co-Author, California Trusts and Estates Quarterly, Volume 25 Issue 3 (2019)
- “Principal and Income” (Chapter 8), Update Author, CEB California Trust Administration (November 2019)
- “Marital Deduction: Overview and Formula Clauses” (Chapter 17), Update Author, CEB California Will Drafting (July 2019)
- “Marital Deduction Power of Appointment Trusts” (Chapter 18), Update Author, CEB California Will Drafting (July 2019)
- “Qualified Terminable Interest Property Trusts and Qualified Domestic Trusts” (Chapter 19), Update Author, CEB California Will Drafting (July 2019)
- “Bypass Trusts and Disclaimer Trusts” (Chapter 20), Update Author, CEB California Will Drafting (July 2019)
- “Probate Boot Camp: Marshalling and Valuing Assets,” Presenter, National Business Institute (June 2019)
- “Probate Boot Camp: Handling Debts and Creditors Claims,” Presenter, National Business Institute (June 2019)
- “Top 10 Things Estate Planners Need to Know About Planning for Retirement Assets,” Co-Presenter, CEB (February 2019)
- “Ethical Considerations” (Chapter 2), Update Author, CEB California Estate Planning (January 2019)
- “Marital Deduction Planning” (Chapter 17), Update Author, CEB California Estate Planning (January 2019)
- “Marital Deduction: Overview and Formula Clauses” (Chapter 17), Update Author, CEB California Will Drafting (August 2018)
- “Qualified Terminable Interest Property Trusts and Qualified Domestic Trusts” (Chapter 19), Update Author, CEB California Will Drafting (August 2018)
- “Bypass Trusts and Disclaimer Trusts” (Chapter 20), Update Author, CEB California Will Drafting (August 2018)
- “Not in the Family: When to Name a Corporate Trustee,” Co-Author, The Journal of Financial Planning (June 2015)

## **Professional Recognition & Awards**

- Certified Specialist in Estate Planning, Trust, and Probate Law by the California State Bar
- Super Lawyers, Rising Star (2020-Present)

## **Previous Professional Experience**

- Dorsey & Whitney, LLP, Associate (2018-2019)
- Gaw Van Male, LLP, Associate (2017-2018)
- Estate Plan, Inc., Associate and Of Counsel (2016-2017)
- U.S. Trust, Bank of America Private Wealth Management, Trust Administrative Officer II, (2015-2016)
- University of California, Irvine School of Law, Judicial Extern to the Hon. Meredith A. Jury
- University of California, Irvine School of Law, Judicial Extern to the Hon. Scott C. Clarkson
- University of California, Irvine School of Law, Research Assistant for Professor Katherine Porter
- United States Department of Justice, Intern

## **Bar Admissions**

- California