FENNEMORE.

MONICA DELL'OSSO

Director

Trusts & Estates
Estate Litigation
Family Office & Private Client Attorneys
Estate Planning

Oakland

P: 510.834.6600 F: 510.834.1928

mdellosso@fennemorelaw.com

MONICA DELL'OSSO

Monica has more than 35 years of experience in trusts and estates. A respected leader in the field, she combines extensive insight and experience with a committed, passionate, and caring approach. She is a trusted advisor for a range of clients, with a practice focus on sophisticated estate and gift tax planning, estate and trust administration, and contested matters in estates and trusts.
Working closely with clients, Monica prepares complex estate plans that utilize sophisticated techniques for effective wealth transfer. She provides comprehensive guidance and handles numerous administration matters, including formal probates and post-death trust administrations.

Monica has written and lectured on a wide range of topics related to trusts and estates. A certified specialist in probate, estate planning and trust law by the State Bar of California Board of Legal Specialization and a Fellow of the American College of Trust and Estate Counsel (ACTEC)she is regularly selected for inclusion in multiple peer-rated publications, such as Northern California Super Lawyers.

EDUCATION

- Ph.D. University of Virginia
- J.D., University of California, Berkeley School of Law
- B.A., *summa cum laude*, St. Mary-of-the-Woods College

AREAS OF PRACTICE

- Trusts & Estates
- Estate Litigation
- Family Office & Private Client Attorneys
- Estate Planning

AWARDS AND HONORS

- Certified Specialist – Probate, Estate Planning and Trust Law, State Bar of California Board of Legal Specialization
- Northern California's Top 100 *Super Lawyers*, 2007-present
- *Best Lawyers in America*®, 2006, 2007, 2010-2024
- Top 50 Women *Super Lawyers*, 2007-2022

ARTICLES AND PRESENTATIONS

- Author, "Estate Planning for Vacation Homes," Estate Planning for Special Assets, Continuing Education of the Bar (CEB), 2005, updated 2008, 2010, and 2014
- Author, "Difficult Family Situations," Complete Plans from Small and Mid-Size Estates, Continuing Education of the Bar (CEB), 2007, updated 2008 – 2010 and 2014
- Co-Author, California Civil Practice: Probate and Trust Proceedings, 4 volumes, Thompson, 1993, updated semi-annually
- Author, "Surrogate Financial Management," California Elder Law Resources, Benefits and Planning: An Advocate's Guide, Continuing Education of the Bar (CEB), 1993, updated 2003, 2005, 2007, 2010 and 2013
- Co-Author, Funding A Revocable Trust, Continuing Education of the Bar (CEB), 1993, updated 2002 and 2003
- Co-Author, "Tax Considerations" Drafting California Revocable Trusts, Continuing Education of the Bar (CEB), 2003
- Author, "Income Tax Basis," California Estate Planning, Continuing Education of the Bar (CEB), 2002
- Author, "Current Developments in Planning with Private/Family Split Dollar Insurance and Stock Options," 52 Major Tax Planning, Lexis Publishing, 2000
- Co-Author, "Marital Deduction Trusts," California Transactions Forms – Estate Planning, West Publishing Company, 1999
- Co-Author, "Trusts for Minors," Drafting California Irrevocable Trusts, Continuing Education of the Bar (CEB), 1997
- Author, "Representing the Absconding Fiduciary: The Ethical Issues," California Trusts and Estates Quarterly, 1996
- Co-Author, "Estate Planning for Children: An Overview," Estate Planning 1996, Continuing Education of the Bar (CEB), 1996
- Co-Panelist, "Subtrust Funding and Administering Ongoing Trusts," East Bay Trusts and Estates Lawyers, Trust Administration Boot Camp, 2021
- Co-Panelist, "Trust and Estate Litigation Seminar: A Comprehensive Analysis from Intake to Resolution," Continuing Education of the Bar (CEB), December 2010
- Co-Panelist, "How to Cope with the Current Estate and Gift Tax Laws – What are they?" Thirty-Second Annual UCLA-CEB Estate Planning Institute, May 2010
- Co-Panelist, "Estate Litigation: Tactical Issues. Case Studies and Resolution Scenarios," Continuing Education of the Bar (CEB), December 2008
- Co-Panelist, "Advanced Estate Planning Practice Update – Fall 2007," ALI-ABA, September 2007
- Speaker, "Post-Mortem Estate Planning," Professional Education Broadcast Network, November 2006 and August 2007
- Speaker, "Post Death Tax Planning and Elections," 37th Annual Estate Planning Institute, Practicing Law Institute (PLI), October 2006
- Speaker, "Post Death Tax Planning and Elections," Tax Strategies for the High-Income Individual, American Institute of Certified Public Accountants, May 2006
- Co-Panelist, "Advanced Estate Planning Practice Update – Winter 2006," ALI-ABA, February 2006
- Speaker, "Estate Litigation: Tactical Issues, Case Studies and Resolution Scenarios," Continuing Education of the Bar (CEB), November 2005

- Speaker, "Use of Disclaimers," San Francisco Estate Planning Council, November 2005
- Speaker, "Post-Death Tax Planning and Elections," 36th Annual Estate Planning Institute, Practicing Law Institute (PLI), October 2005
- Speaker, "Making Waivers Work: Disclosure v. Intelligibility," Representing Trust and Estate Beneficiaries and Fiduciaries, ALI-ABA, July 2005
- Speaker, "Who's the Client? Ethics for the Trust and Estate Counsel," State Bar Section Education Institute, January 2005
- Co-Panelist, "Estate Planning for Special Assets," Continuing Education of the Bar (CEB), January 2005
- Speaker, "Current Developments in Planning with Private/Family Split Dollar Insurance and Stock Options," USC Law School 52nd Institute on Federal Taxation, 2000

PROFESSIONAL AND COMMUNITY ACTIVITIES

- Fellow, American College of Trust and Estate Counsel
- Co-Chair, UCLA-CEB Estate Planning Institute
- Past Chair, Estate Planning, Trust and Probate Law Section, Alameda County Bar Association
- Member, Board of Directors, Legal Assistance For Seniors, 2001-2016

ADMISSIONS

- California