



Sonia Agee

Shareholder, Business and Tax Group

Practice Overview

Sonia M. Agee practices in the firm's Business and Tax Group. She focuses on tax-oriented planning for businesses, corporations, and individuals. Her clients include closely held businesses and corporations, individuals, and start-up companies.

Ms. Agee's advanced tax background is an asset to her clients in the areas of tax planning and counseling, tax audits and litigation, and tax matters related to exempt organizations. Her tax background coupled with her corporate experience is particularly beneficial to her clients in the areas of mergers, acquisitions, and re-organizations. She also has experience handling international estate and income tax planning, including offshore entity formation and transactions.

Ms. Agee assists individuals and businesses with their estate planning needs, including wealth transfer planning, business succession planning, closely held business planning, charitable planning, and tax counseling. She also handles income and estate tax planning for foreign nationals.

Recent Matters

- Re-organization of family business structures and holdings involving non-liquid assets in conjunction with settlement of an estate.
- Structure and implementation of United States and Canadian business tax planning for an American client.
- Estate tax planning involving planned gifting through the use of family limited partnerships, charitable remainder trusts, and children and grandchildren trusts.

Professional Activities

Ms. Agee is a member of the Santa Clara Bar Association and its Tax Section, the Santa Clara County Estate Planning Council, as well as a member of the Peninsula Volunteer Community Advisory Board. She was a 2006 "Northern California Super Lawyer," as chosen by her peers and through the independent research of *Law & Politics* and *San Francisco Magazine*.

Admissions

She is admitted to practice law in all California Courts, the United States District Court for the Northern District of California, the Ninth Circuit Court of Appeals, and the United States Tax Court. She is licensed to practice law in California, New York, Massachusetts, Washington, and the District of Columbia. Ms. Agee is a Bar Certified Specialist in Taxation.

Education

LLM in Taxation, Golden Gate
University (with honors)

J.D., Temple University

B.A., International Relations,
Boston University

Licensed to practice in California

Contact

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