



**JERAD BELTZ**

Partner

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Office: Irvine

**PRACTICE AREAS**

Trusts and Estates  
Estate and Gift Planning  
Business Transactions and Tax

**EDUCATION**

J.D., University of Southern California  
Gould School of Law  
Order of the Coif  
Law Review B.A., Yale University

**ADMITTED TO PRACTICE**

State Bar of California  
American Bar Association  
Orange County Bar Association  
(Trusts and Estates Section)

Jerad Beltz focuses his practice in the areas of estate planning, trust administration and business transactions.

» **Trusted legal advisor**

Mr. Beltz works with high-net-worth individuals and privately held businesses with a particular focus on wealth preservation, philanthropic planning and succession planning. He also advises clients in a wide range of corporate and business matters. Many clients rely on Mr. Beltz as their outside general counsel, and he enjoys the variety and familiarity of serving as a trusted legal advisor in that capacity. In each case, Mr. Beltz strives to understand the unique goals and motivations of his client in order to develop long-term strategies and solutions that will serve generations to come.

» **Adjunct professor**

In addition to his law practice, Mr. Beltz has served as an Adjunct Professor at Trinity Law School in Santa Ana, California. He is currently on the faculty of the American Institute for Philanthropic Studies. He also serves on the board of directors for multiple nonprofit organizations in Orange County.

**Professional & Community Involvement**

» Orange County Bar Association | Trust and Estates Section

**Presentations & Publications**

» Learn How the Tax Cuts and Jobs Act Affects You | March 1, 2018