



VALISA A. CARNEY

Partner

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Office: Irvine

PRACTICE AREAS

Trusts and Estates
Estate and Gift Planning
Trusts and Estates Administration

EDUCATION

LL.M. in Taxation, magna cum laude,
University of San Diego School of Law
J.D., University of Oregon M.B.A.,
University of Oregon B.A., University
of California Riverside

ADMITTED TO PRACTICE

California
Oregon | Inactive
U.S. District Court for the Southern
District of California

Valisa A. Carney is the Chair of the firm's Trusts and Estates Department.

» **Compassion, knowledge, integrity**

Clients with a desire to provide for a responsible, tax-efficient disposition of their hard-earned wealth can rely on the compassion, knowledge, integrity, and personal attention with which Valisa approaches their estate planning goals. She is unique in that she establishes a close personal relationship with her clients that fosters comfort and trust. When a client's loved one passes away, she and her experienced team provide a caring environment and timely, effective assistance in the administration of the trust and estate matters. Clients from all walks of life value Valisa's expertise in the very important areas of tax and estate planning and trust administration and the caring way in which she works with them to puzzle through these processes.

» **Resources of a full service law firm**

Valisa's clients also have the advantage of access to the expertise of her partners at Freeman Freeman & Smiley who specialize in many areas of the law. The firm can take care of most their legal needs under one roof. In 2021, she was named to the Southern California Super Lawyers list, a designation bestowed on only the top 5% of lawyers in this region.

Professional & Community Involvement

- » Orange County Bar Association
- » Orange County Estate Planning Council
- » Hoag Hospital Foundation | Planned Giving Advisory Committee
- » Big Brothers Big Sisters of Orange County | Volunteer | 2007 to present | "2020 Big of the Year" Finalist
- » Camp Fire USA | Orange County Council | 2004 - 2005
- » Volunteers in Parole, San Diego | 2000 - 2001

Presentations & Publications

- » Learn How the Tax Cuts and Jobs Act Affects You | March 1, 2018
- » IRS Contemplates Change in Wealth Transfer Strategy | August 6, 2015
- » "Living Trusts & More" | Orange Empire Chartered Property Casualty Underwriters (CPCU) Society Chapter | May 7, 2015
- » "Living Trusts & More" | "It's Your Estate" Workshop Series | December 25, 2014
- » "Planning the Small and Mid-Sized Estate" | CEB sponsored panel discussion at UCLA | November 1, 2013
- » "American Taxpayer Relief Act of 2012" | February 7, 2013
- » "IRA; 401k; 403b and 457 Plan Distributions" | "It's Your Estate" Workshop Series at St. Joseph Special Events Center | October 11, 2012
- » "Trust Distribution Provisions for Capacitated/Surviving Spouse" | Riverside Estate Planning Council | May 5, 2010
- » "Looking Ahead to 2010 & 2011 & Beyond" | Desert Community Foundation | September 25, 2008
- » "Estate Planning Basics" | "It's Your Estate" Workshop Series | December 20, 2007

- » "Mistakes to Avoid in Estate Planning" | California Dental Association - 2007 Spring Scientific Session | May 17, 2007
- » "Estate Planning" | University of California, Irvine, HR/Benefits Retirement Planning Program Series | February 16, 2006