FRED J. MARCUS
Of Counsel

310.255.6105
Fred.Marcus@ffslaw.com

Office: Century City

PRACTICE AREAS

Trusts and Estates
Estate and Gift Planning
Trusts and Estates Administration

EDUCATION

LL.M. in Taxation, New York University School of Law J.D., Loyola Law School B.A., Pacific Oaks College University of California at Berkeley

ADMITED TO PRACTICE

California
California Board of Legal Specialization | Certified Specialist – Estate Planning, Trust & Probate Law
U.S. Tax Court
U.S. Court of Appeals for the Ninth Circuit
U.S. District Courts for the Central, Southern, Northern and Eastern Districts of California

In the nonprofit world, "ask Fred" is a common refrain when a complicated planning issue is involved. Fred J. Marcus is a long-time partner and a member of our Trusts and Estates and Charitable Planning Departments.

» Representing individuals, trustees and non-profits

His practice includes representing individuals in their estate and philanthropic planning, trustees in their administration of significant wealth, and nonprofit organizations in connection with planned giving, organizational questions and operational issues.

» Frequent author and lecturer

A certified specialist in Estate Planning, Probate and Trust Law, Mr. Marcus lectures and writes frequently about estate planning, tax exempt organizations, and charitable and business planning issues.

» Honors

Mr. Marcus has been awarded an AV Preeminent® Rating by Martindale-Hubbell® Peer Review, the highest rating in legal ability and ethical standards. He has been consistently recognized on the Southern California Super Lawyers list (2009-2019), a designation bestowed on only the top 5% of lawyers in this region.

Professional & Community Involvement

- » National Association of Charitable Gift Planners
- » Los Angeles Council of Charitable Gift Planners
- » Los Angeles County Bar Association | Taxation Section and Exempt Organizations Section
- » Journal of Gift Planning | Editorial Review Board | 2002 - 2010
- » Planned Giving Design Center | Editorial Review Board | 2002 - 2010
- » Pacific Oaks College | Chairman of the Board | Present | Board of Directors | 2004 - 2010, 2015 - 2017
- » Wise Senior Services | Chairman | Endowment Committee | 1992 - 2005
- » Wise Senior Services Outstanding Service Award | 2001
- » Leave a Legacy Southern California | Chairman | 2001
- » Planned Giving Round Table of Southern California | President (2000)

Presentations & Publications

- » Learn How the Tax Cuts and Jobs Act Affects You | March 1, 2018
- » "Organizing and Maintaining Tax Exempt Status" | Tax Exempt Organizations and Private Foundations, Federal Tax Services (published by Matthew Bender) |
- » IRS Contemplates Change in Wealth Transfer Strategy | August 5, 2015
- » “Living Trusts & More” | “It’s Your Estate” Workshop Series | December 5, 2014
- » “Entitled or Unworthy: Family Legacy Issues” | 2013 Western Regional Planned Giving Conference | April 4, 2013
- » "Charitable Planning in a Time of Uncertainty" | Visiting Nurse & Hospice Care Sansum Diabetes Research Institute | August 17, 2012

» "Decision 2012 - The End of 2010 Tax Relief Act" | Neuberger Berman Group LLC | August 3, 2012

» "Primer on Community Property" | AICPA 29th Annual Advanced Estate Planning Conference | August 2, 2012

» "Decision 2012 - The End of 2010 Tax Relief Act" | Neuberger Berman Group, LLP | March 7, 2012

» "Opportunities in Planned Giving" | Cal State Fullerton Philanthropic Foundation | October 7, 2005

» "Shams and Scams" | Planned Giving Roundtable of Southern California | September 8, 2005

» "Restricted Funds" | Western Regional Conference on Planned Giving | May 1, 2003

» "Restricted Funds: How Restricted is Restricted?" | California CPA Education Foundation Not-for Profit Organization Conference | January 1, 2003

» "Flipping the Switch" | Journal of Gift Planning | August 9, 2001

» "Charitable Planning for Stock Options, Rule 144 Stock and IPOs" | National Conference on Planned Giving | October 14, 1998

» "Charitable Gifting Part I: Assets and Entities" | American Institute of Philanthropic Studies | July 7, 1994

» "Estate Planning Developments" | C.L.U. Journal | July 4, 1985