



Kurt Ketchum

Partner

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Practice Areas

Wealth Planning & Family Office

Closely Held Business Transactions

Corporate Law

Family Office Services

Startups & Emerging Businesses

Bar Memberships

California

Kurt counsels clients in a wide variety of trust and estate and business planning matters. His practice focuses on advising clients regarding generational wealth transfer planning, as well as structuring and implementing estate tax reduction strategies according to his clients' personal objectives and specific asset mix. Kurt also advises clients regarding complex trust administration and estate settlement matters.

In addition, Kurt represents and advises business owners in all aspects of planning for their closely held and family-owned businesses, including structuring and formation of business entities, private transactions, maintenance and compliance, commercial contracts, and shareholder buy-sell agreements. A significant portion of Kurt's practice involves working closely with business owners to develop business succession plans that are seamlessly integrated with their personal Trust and Estate planning.

Kurt makes it a priority to work closely with each client's team of advisors, including accountants and financial advisors, to establish and maintain cohesion between all aspects of their personal and business planning.

Other Info About Kurt

Experience

Kurt works with his clients to design and implement strategies and entities to maximize income and estate tax efficiency, including:

- Charitable Remainder Trusts (CRTs) and Charitable Lead Trusts (CLTs)
- Irrevocable Trusts and Dynasty Trusts for children and grandchildren
- Gifts and Instalment Sales to Intentionally Defective Grantor Trusts (IDGTs)
- Spousal Lifetime Access Trusts (SLATs)
- Grantor Retained Annuity Trusts (GRATs)
- Irrevocable Life Insurance Trusts (ILITs)

Kurt also advises his clients in all aspects and phases of their closely held business, including formation and structuring, ongoing compliance and maintenance, as well as intra-family and third party transfers and transactions. His clients' businesses encompass a number of fields and industries, including:

- Construction
- Real Estate Development and Management
- Insurance Brokerages
- Charitable and Non-Profit Organizations
- Healthcare
- Education
- Manufacturing
- Auto Dealers

Education

Chapman University Dale E. Fowler School of Law, J.D.

- Chapman Law Review, Articles Editor

Chapman University, B.S.

Courts

United States District Court, Central District of California

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