



Estate Planning Attorney and Counselor Robert P. Bergman

Bob Bergman's client-centered estate planning practice focuses on crafting estate plans that include and implement the deepest needs, desires and wishes of his clients. He helps his clients take maximum advantage of the tax and inheritance laws to avoid Probate, avoid Conservatorship, and quickly and inexpensively pass their estates on to their heirs after death. He also assists his clients with strategies to protect the inheritance they are passing on to their heirs from creditors' claims, divorce, and bankruptcy.

Bob's late father, a career Air Force officer, World War II veteran, and successful real estate broker here in the Santa Clara Valley, always told him, "if you provide more service to your clients than they expect, you will never be out of business." Bob enjoys his profession, and derives great satisfaction from helping his clients achieve their planning goals and dreams.

A 1980 graduate of Santa Clara Law School, Bob's law practice over the years has included acting as General Legal Counsel for a major real estate company. He has also served as Executive Vice President of a major estate planning firm, and was the Vice President and Business Development Officer for Comerica Bank Institutional Trust Department, with responsibility for the entire Western Region of the United States.

Bob has practical experience and training in the fields of insurance, securities, real estate and financial planning. This additional experience enables him to bring several different perspectives to the estate planning process. He has practiced as a real estate broker, insurance agent, and a securities registered representative.

Bob has conducted over 200 seminars on estate planning for civic groups, churches, clubs, families, and the general public.

Bob is a member of WealthCounsel, a national organization of estate planning attorneys, who use sophisticated document assembly software systems to permit an extremely high degree of customized planning options for their clients. Bob is also a founding member of the Advisors Forum, a national interdisciplinary organization of estate planning attorneys, financial planners, CPAs, and other professionals who design sophisticated estate planning techniques for individuals and families.

Bob also is a member of the Academy of Special Needs Planners, helping families with children that have disabilities and other special needs with their planning needs.

Additionally, Bob was a former Speaker on estate planning and asset protection for the Foundation for Personal Financial Education and the Financial Knowledge Institute, both of which are 501(c)(3) nonprofits dedicated to providing free workshops on financial planning, estate planning, home ownership and mortgages to businesses, associations, municipalities and government agencies.

Bob's estate planning practice focuses on individuals and couples who have minor children by creating estate plans that not only handle the needs of the clients, but the needs of their children as well.

Bob is admitted to practice before all California courts, the United States Tax Court, and the United States District Court for the Northern District of California.

In his "spare" time, Bob sings and acts with several San Francisco Bay Area performing arts companies. He is also an avid amateur military historian.

Bob is married, and he and wife, attorney Jennifer A. Lotz, have twin baby girls Sabrina and Giovanna.



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