



Peter S. Myers

Partner

psmyers@foxrothschild.com



San Francisco, CA
Tel: 415.651.1465
Fax: 415.391.4436



Los Angeles, CA
Tel: 415.651.1465
Fax: 310.556.9828

Peter Myers is Certified as a Specialist in Estate Planning, Trust and Probate Law by the State Bar of California's Board of Legal Specialization.

Handling high-net-worth planning, business succession, and trusts and estates disputes, he guides individuals and families who need a reliable relationship with a caring, experienced lawyer who will assist them in times of greatest personal opportunity, life event, or crisis.

Peter frequently writes and teaches in the areas of estate planning, family business entities and estate planning and has authored and published treatises, books and articles, regularly speaking throughout the country on topics of interest to wealthy families and their advisers, as well as at conventions of professionals. His speaking engagements include the National Network of Estate Planning Attorneys, WealthCounsel, LLC, The Southern California Institute, California Continuing Education of the Bar and various ancillary CLE Providers. His published work appears in CEB, Trusts and Estates Magazine, iUniverse, and Wonderdads.

Services

- Taxation & Wealth Planning
- Trust & Estate Law & Administration
- Federal Estate & Gift Tax Planning
- Fiduciary Litigation
- Food & Beverage
- Emerging Companies & Venture Capital
- Private Equity
- Family Offices
- Fintech & Digital Assets

Before Fox Rothschild

Prior to joining Fox Rothschild, Peter was a principal of Myers Kenney P.C. (previously known as Myers Urbatsch, P.C.).

Peter also practiced antitrust and securities law with a national firm from 1987 through 1992 before starting his own firm.

Beyond Fox Rothschild

Peter is the executive editor of the book *Business Succession Planning: Strategies for California Estate Planners and Business Attorneys*, published by Continuing Education of the Bar-California. He was an adjunct faculty member at Golden Gate University, San Francisco campus, and The Wealth Strategies Institute at Michigan State University, where he taught stock options planning.

Peter also offers popular educational seminars and training courses for consumers, attorneys, business owners, accountants and other related professionals, including the annual Fiduciary Attorney Summit in (to be held this year in Santa Barbara) and a Review Course for the Exam to Become a California Certified Specialist in Estate Planning, Trust and Probate Law.

Bar Admissions

- California
- Nevada

Court Admissions

- U.S. Tax Court
- U.S. Court of Appeals, Ninth Circuit
- U.S. District Court, Central District of California
- U.S. District Court, Eastern District of California
- U.S. District Court, Northern District of California
- U.S. District Court, Southern District of California

Education

- University of California College of the Law, San Francisco (J.D., 1984)
- American University (B.A., *cum laude*, 1981)
 - American College, Paris
 - American University, Rome

Memberships

- Estate & Trust Education Resources
 - Founding Member and Content Editor
- California CEB Advisory Board, 2007-2014
- California Bar Association
 - Tax, Estate Planning Sections
 - Trust Law Section
- San Francisco Bar Association
- East Bay Estate Planning Council
- East Bay Tax Club
- East Bay Trust and Estates Lawyers (EBTEL)
- National Network of Estate Planning Attorneys
 - California Forum Chair (Faculty, Advanced Planning Program, 2010-present)
- WealthCounsel LLC
 - WealthCounsel Advisors' Forum (2006-2016)
- Fellow, The Laureate Circle (a national estate and wealth planning strategies think tank)

Board of Directors

- California Continuing Education of the Bar (CEB), Advisory Board of Directors (2006-2014)
- Oakland East Bay Symphony (2008-2013)
- Oakland Youth Orchestra (2011-2013)
- Barristers Club of San Francisco (1992-1995)

- Holy Family Day Home (1993-1996)

Honors & Awards

- Named a Northern California "Super Lawyer" for Estate Planning & Probate Law by *Super Lawyers Magazine* (2004-2020)
- Named among the "Top 100 Lawyers" in the U.S. by The Robb Report/*Worth Magazine* (2005-2006)
- Martindale-Hubbell "AV" rated since 1995
- Named the Business Succession Attorney of the Year by *Lawyers' Monthly* magazine in 2013
- Recipient of the Wiley W. Manuel Award in 1990-91 and 1991-92 (State Bar of California Board of Governors' Award for provision of legal services to the poor)
- Recipient of the Outstanding Attorney in Public Service Award, 1991 (BASF Volunteer Legal Services Program)

Publications

July 13, 2023

California Closes Tax Loophole That Shielded Out-of-State 'ING' Trusts

January 13, 2023

Silver Lining? IRS Extends Filing, Payment Deadlines for California Storm Victims

April 21, 2021

How Much Is Too Much to Pay a Trustee? An Analysis of the Facts-and-Circumstances Test of the California Rules of Court, Rule 7.776

California Lawyers Association

July 2017

Location, Location, Location - and a Little T&E Navigation

Trusts & Estates Magazine

September 14, 2016

New Tax Regulations Will Impact High-Net-Worth Estate Planning

Taxation and Wealth Planning Alert

Events

October 26 -27, 2025

The Gathering & Fiduciary Attorney Summit: Strategies for Exit Planning

The Westin South Coast Plaza

November 18-20, 2024

Fiduciary Attorney Summit 2024

Santa Barbara, CA

November 14, 2023

A Pre-Immigration Primer: Smart Tax Strategies for the High-Net-Worth International Family

Webinar

November 6-8, 2023

2023 Fiduciary Attorney Summit

Santa Barbara, CA

October 31, 2023

Breakfast Reception in Connection With the 2023 IBA Annual Conference in Paris

Hyatt Regency Paris Étoile

November 8-10, 2022

2022 Fiduciary Attorney Summit

Santa Barbara, CA

July 20, 2021

Lawyers in Transition: Succession Planning for Trust and Estate Attorneys

Webinar

July 14, 2021

Growing A Practice Through Building Attorney Networks

Webinar

May 5, 2021

How Much Is Too Much? Trustee Compensation and an Analysis of California Rules of Court 7.776

Webinar

November 1, 2020

Current Developments in Nevada and California Law,

November 1, 2020

Serving as an Expert Witness in Trusts and Estates Litigation

Webinar

September 1, 2020

California Income Taxation of Departing [Soon To Be Former] Residents And Their Trusts

Webinar

August 1, 2019

Business Succession Planning

Boston Park Plaza Hotel

February 7, 2019

2019 Fiduciary Attorney Summit

The Ritz-Carlton Bacara, Santa Barbara

December 19, 2018

2018 Year-End Tax Planning: Basics and Beyond

Webinar

October 16, 2018

The Alphabet Soup of Advanced Trusts, Administering the Trust

La Provence

July 31, 2018

Estate Planning for Special Cases: Athletes, Celebrities, Entertainers, and Selected Others

San Diego, CA

July 13, 2018

Pacific Currents: California Income Taxation of Departing Residents & Their Trusts

Webinar

June 8, 2018

Pacific Currents: State Law and Tax Updates & Essentials

Webinar

February 23, 2018

Taxes, Control and Cash Flow: Personal Planning Before, During and After the Sale of a Business

The Westin San Diego Gaslamp Quarter

February 23, 2018

Taxes, Control, and Cash Flow: Personal Planning Before, During and After the Sale of a Business

The Westin Gaslamp Quarter Hotel

February 8, 2018

2018 Fiduciary Attorney Summit

The Ritz-Carlton Bacara, Santa Barbara 8301 Hollister Ave Goleta, CA 93117

December 28, 2017

Think Fast: Last-Minute Strategies for Year-End Planning in Light of the New Tax Act

Webinar

November 16, 2017

Wealth Building Seminar

Armanino LLP

September 14, 2017

Ownership Transition: Build Teams, Not Walls

Hilton San Diego Resort & Spa

January 12, 2017

2017 Fiduciary Attorney Summit

Lake Tahoe Resort Hotel

September 27, 2016

ACEC California 2016 Annual Conference

January 1, 2016

Handling Business Interests in Probate

News

July 7, 2016

As Merger Fever Continues, Phila. Market Is Hot

July 7, 2016

US Law Firm Mergers Surged Midyear, Report Says

July 7, 2016

In Merger Frenzy, Too Many Firms with Delusions of Grandeur?

July 6, 2016

Law Firm Mergers Keep Pace with 2015's Record

April 29, 2016

On the Move

April 27, 2016

Lateral Moves

April 26, 2016

Fox Rothschild Adds Tax and Trusts Trio in San Francisco

CA Estate Planning Certified Specialist Prep Course

Peter serves as the main faculty member for the Fox Rothschild CA Estate Planning Certified Specialist Prep Course. The course is a California-specific, self-paced online tutorial designed to help professionals study for the Certified Specialist Exam in estate planning, trust and probate law. The next exam is scheduled for October 30, 2025.

It includes:

- 20 weeks' worth of review material
- 400+ sample multiple choice questions
- Online quizzes and threaded discussions
- Audio lecture files for on-the-go learning
- Live and recorded teleconferences/webinars
- 2-day in-person series

If you would like to reserve your spot or have any questions, please email events@foxrothschild.com.