

JAMES K. LEESE is a senior partner in the law firm of Ferruzzo & Ferruzzo, LLP. Born in 1953 at Dayton, Ohio, he was admitted to the California bar in 1979. The State Bar of California recognizes him as a Certified Specialist in Estate Planning, Trust and Probate Law.

In the early years of Mr. Leese's practice, he focused on the areas of business and real estate transactions and civil litigation. With that broad background, in the mid 1980's Mr. Leese practice switched to focusing on estate planning. Thus began the expansion of the firm's estate planning footprint, stretching from one attorney to what are now many attorneys who are able to concentrate upon different aspects of the estate planning, estate and trust administration, probates and litigation, making Ferruzzo well known and respected within the Orange County community and beyond.

These days Mr. Leese limits his primary practice to the transaction side of estate planning and business succession planning, serving clients, and their advisors, in a team approach, to recognize and solve the complex relational and tax issues which make up trust planning, succession planning, and estate and gift tax planning. Mr. Leese continues to mentor and counsel the attorneys within the firm's estate planning practice, and still serves the firm as Chair of the Estate Planning and (uncontested) Trust Administration Practice Group.

Between 1994 and 2020, Mr. Leese taught estate planning courses offered in the Personal Financial Planning Certificate Program at the University of California - Continuing Education. He has been a guest speaker on succession planning, for the Cal State Fullerton's undergraduate class on Family Business Dynamics. He has spoken to such groups as the National Business Institute, the Orange County/Long Beach Chapter of the California Society of Certified Public Accountants, the Arthritis Foundation, the Easter Seals Society, and to many civil service employees of many federal agencies, which have included the United States Airforce, Department of Homeland Security, Immigration and Naturalization, and Alcohol, Tobacco and Firearms.

Areas of Practice:

Fundamental Estate Planning, Trusts, Wills and Powers of Attorney (health and financial)
Advanced Estate Planning (Lifetime and Death transfers)
Trust Administration (uncontested)
Business Succession (family owned business succession)
Charitable Planning

Bar Admissions:

California, 1979

Education:

The Defiance College, Defiance, Ohio, Bachelor of Science, Political Science, 1975, *cum laude*
Pepperdine University School of Law, Malibu, California, Juris Doctor, 1978
Golden Gate University, San Francisco, California, Master of Science in Taxation, 1992

Published Works:

Advanced Estate Planning for Financial Professionals, (Co-Author) 1996 -2010
Estate Planning & Taxation, (Contributor), Kendal-Hunt 1996, 2012
Best Estate Plans Take Family Dynamics into Consideration, Best Practices for Structuring Trusts and Estates, 2015 Edition, 2015 Thomson Reuters / Aspatore

Personal:

Mr. Leese is married to Jennifer Leese, and together they have five children, Angela, Lauren, Alyssa, Ryder and Dylan.