

## Sandra M. Serna, Senior Paralegal

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Sandra M. Serna is a Senior Paralegal for the firm servicing the Wealth and Philanthropic Planning and Charitable and Tax Exempt Organizations practice groups. With respect to her support of the Wealth and Philanthropic Planning Group, her responsibilities include assisting attorneys with...

- Preparation of wills, trust agreements, powers of attorney, and health care documents
- Asset transfers and beneficiary designations
- Probate and trust administration
- Federal Estate tax returns
- Preparation of inventories and final allocation of assets
- Court document drafting and filing

**In addition, Sandra works with attorneys across numerous corporate matters, including such areas as...**

- Incorporation of for-profit and non-profit organizations
- Applications for tax-exempt status for non-profit organizations
- California property tax exemptions
- Formation and dissolution of corporations, limited liability companies, and partnerships
- Corporate governance

Sandra has been with the firm for 13 years having been a paralegal at two other Los Angeles based law firms, Bingham McCutchen LLP and Riordan & McKinzie, over the past 20 years. She received her Paralegal Certificate with honors in 1995 from Watterson College in Pasadena. She has served as past Secretary for The Riordan Foundation and Rx For Reading and is a board member of St. John Evangelical Lutheran Church. Sandra's depth of knowledge of the firm's clients and culture supports her paralegal responsibilities and her long-term service to the firm.