

H|B|Z

Hartog Baer Zabronsky
TRUST AND ESTATE LAW

A Professional Corporation



AMANDA E. SHERWOOD

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Amanda Sherwood is an attorney in both the firm's litigation and transactional groups. She is an experienced trial lawyer who has expanded her practice to include trust and estate planning and administration. She litigated complex child welfare law matters before transitioning exclusively to trust and estate law.

Amanda has over 13 years of legal experience. She has made hundreds of court appearances for law-and-motion matters and bench trials and has represented clients in California's First District Court of Appeal. Amanda also has extensive experience in reaching settlement agreements favorable to her clients, sparing them the time and

challenges that come with a trial. Her transactional experience includes helping families wrap up the affairs of their deceased loved ones, advising trustees of multi-million-dollar irrevocable trusts, and crafting estate plans that meet the unique needs of each client. This versatility enables her to assist her clients in every aspect of the estate planning and administrative process.

As a child welfare lawyer, Amanda worked with parents, children, and relatives to navigate the foster care system and complex family dynamics. She is adept at working with people from all walks of life. She advocates vigorously for her clients and meets them with compassion and understanding.

Amanda graduated cum laude from Whitman College in Walla Walla, Washington in 2005. She is a 2010 graduate of U.C. Davis School of Law, King Hall. At King Hall, Amanda was inducted into The Order of Barristers, a national honorary organization recognizing excellence in oral advocacy and brief writing.

Amanda was born and raised in Marin County, and now lives in Orinda with her husband and two children.

PROFESSIONAL EXPERIENCE

Hartog, Baer, Zabronsky, APC — Orinda, CA (January, 2021–present. Formerly Hartog, Baer, Zabronsky & Verriere, APC, and Hartog, Baer & Hand APC)

- Represent individuals in fiduciary and beneficiary capacities to administer and litigate probate and trust matters.
 - *Case Experience Examples:* Represent trustees in administering high net-worth trusts that include complex real property and business holdings; prepare and file IRS Form 706 estate tax returns for taxable estates and for portability; petitioned to approve a trustee’s complex accounting covering a five-year period; represented administrator of an estate in negotiating sale of commercial and residential real property; successfully defeated a writ of supersedeas in the First District Court of Appeal, preventing a stay in the trial court and allowing the client to proceed to a trial; prepared and filed Respondent’s Brief in the First District Court of Appeal regarding writs of attachment in elder abuse actions; represented multiple beneficiaries in an action to invalidate a trust amendment obtained by the trustee from their elderly aunt who suffered from dementia; filed a successful partition action in civil court on behalf of the administrator of an estate; successfully negotiated a reduction of attorney’s fees, saving the client over \$20,000; successfully petitioned the court to move a real property into a trust, thereby avoiding probate and ensuring the trust had over \$3 million in assets to distribute to the beneficiaries.

Law Offices of Amanda E. Sherwood – Lafayette, CA (2017 – 2021)

- Trial counsel for parents, children and young adults in civil juvenile dependency cases, making hundreds of court appearances for both law-and-motion proceedings and evidentiary hearings.
 - *Case Experience Examples:* After a three-day trial, prevailed in contest seeking return of parent’s children to their care; obtained restraining orders for clients seeking protection for themselves and their children from abusive partners; convinced Children and Family Services to change its recommendation to a return of client’s children by submitting compelling trial brief which persuaded Indian tribal representative and expert witness that return was in the best interest of the family.
- Appellate counsel for indigent parents and children as a member of the First District Appellate Project Panel.
 - *Case Experience Examples:* Obtained reversal on appeal from the superior court’s denial of a request to change a court order; obtained conditional reversal on appeal from the superior court’s order terminating parental rights.
- Prepared and presented numerous trainings for professional organizations, including the Contra Costa Bar Association’s Juvenile Law Section, Bay Area Dependency Counselors, California Appellate Defense Counsel, and Bay Area Legal Aid.

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- Provided technical assistance and training to the SPARK Initiative, a project of VOICES/On the Move Bay Area assisting homeless and at-risk youth to gain stability through various government services, including the foster care system.
- Provided technical assistance and training to the HYPE Center and Launchpads, projects of Freedom Forward in collaboration with the San Francisco Department on the Status of Women.

East Bay Children's Law Offices – Oakland, CA (2012-2017)

- First chair counsel for children and young adults in civil juvenile dependency cases.
- Managed a high-volume caseload of between 120-150 cases, with law-and-motion proceedings and bench trials on an almost daily basis.
- Conducted hundreds of evidentiary hearings, which involved testimony of both lay and expert witnesses, including psychologists, physicians, and Indian Child Welfare Act experts.
- Evaluated written reports of social workers and investigators, as well as police reports, forensic interviews, medical records and psychological evaluations.
- Engaged in legislative advocacy through EBCLO's Legislative Committee.
- Developed EBCLO's Guardian Ad Litem protocol with the assistance of a working group.
- Served on EBCLO's Fundraising Committee.

Advokids – Corte Madera, CA (2011-2013)

- Provided legal information and education regarding the Juvenile Dependency Court process to foster parents, therapists, and social workers via the Advokids' telephone hotline. Performed legal research and wrote memos regarding various aspects of Dependency Law.

Family Violence Law Center – Oakland, CA (2011)

- Represented victims of domestic violence in hearings on civil restraining orders. Assisted *pro per* individuals prepare filings to request restraining orders. Prepared and gave a training to educate attorneys in other fields on the law and procedure of Domestic Violence Restraining Orders.

PRESENTATIONS

- *Income and Estate Taxation, Moving to Mastery: Fundamentals of California Trust Administration* course hosted by Urbatsch Law Firm, P.C. (July 2023)
- *Attorney-Client Privilege and Attorney Work Product in Estate Planning and Litigation*, Sacramento Estate Planning Council (February 2023)
- *Do Not Pass Go: 361.5 Bypass*, California Appellate Defense Counsel Annual Summit (March 2021)
- *Working With Homeless Youth: Connecting to the Safety Net*, Freedom Forward HYPE Center (December 2020)
- *Mandatory Reporting*, Freedom Forward HYPE Center (December 2020)
- *§361.5 Bypass*, Bay Area Dependency Counselors (October 2019)

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- *AB-12: An Overview*, SPARK Initiative (January 2019)
- *Juvenile Dependency: An Overview*, Bay Area Legal Aid (August 2018)
- *§361.5 Bypass*, Contra Costa County Bar Association, Juvenile Law Section (June 2018)
- *Juvenile Dependency Law: An Overview*, SPARK Initiative (June 2018)
- *Finding Safety and Stability: Screening For Legal Issues and How Lawyers Can Help*, SPARK Initiative (April 2018)
- *Dependency Basics for Legal Aid Lawyers*, Bay Area Legal Aid Youth Justice Project (November 2017)
- *Domestic Violence Restraining Orders in Juvenile Court*, Alameda County Superior Court Brown Bag Series (June 2015)
- *Guardian ad Litem for Nonminor Dependents: What Do They Do, and Does My Client Need One?* East Bay Children’s Law Offices (August 2013)
- *Domestic Violence Restraining Orders*, Legal Assistance for Seniors (June 2011)

PUBLICATIONS

- Update Editor, Hartog & Handelmann, California Wills & Trusts (Matthew Bender) (2022-2024)
- Update Editor, Hartog & Dirkes, California Trust Practice (Matthew Bender) (2022-2024)
- Guest Co-Editor, Contra Costa Lawyer Magazine, “Dependency and Protective Proceedings,” Volume 35, Number 6 (November 2022).
- Co-Author, *In re Caden C.: The Supreme Court Recognizes No Parent is Perfect*, Contra Costa Lawyer Magazine, Volume 35, Number 6 (November 2022)

EDUCATION

- **J.D., University of California, Davis, School of Law**, Davis, CA
Activities: Trial Practice Honors Board (*Judge Recruitment Chair*), Schwartz-Levi American Inn of Court (*Student Member*), Philip C. Jessup International Law Moot Court Competition, (2008-2010)
Honors: The Order of Barristers; Schwartz-Levi American Inn of Court Merit Scholarship recipient
- **B.A, Whitman College**, Walla Walla, WA
B.A. Theater (with honors), minor in French, cum laude

MEMBERSHIPS

- State Bar of California, December 2010 (Bar No. 273857)
- California Lawyers Association, Trusts and Estates Section
- Contra Costa Bar Association, Estate Planning and Probate Section, Litigation Section
- East Bay Trust and Estates Lawyers