

H|B|Z

Hartog Baer Zabronsky

TRUST AND ESTATE LAW

A Professional Corporation



DAVID T. YU

Email: dyu@hbzlawyers.com

David Yu has over a decade of experience as a trusts and estates attorney in the Bay Area. He began his legal career in estate planning and now also handles trust administration and probate matters.

David has prepared the estate plans of hundreds of clients from a variety of financial and cultural backgrounds, including multigenerational blended families, tech workers with sizable equity compensation, married and unmarried same-sex couples, and international clients with cross-border assets and beneficiaries. Besides estate planning, he also practices in the area of probate and trust administration, representing fiduciaries in the post-death management of estates and trusts.

David attended UC College of the Law San Francisco (formerly U.C. Hastings), where he concentrated in tax law and was a Senior Articles Editor for the school's Business Journal. In his final year, he also externed at the San Francisco Superior Court's Probate Department. He furthered his legal education at Golden Gate University, where he obtained an LL.M. degree in taxation.

David grew up in Hong Kong and San Francisco and has settled in Walnut Creek for more than two decades. He is an avid collector of Danish construction toys.

PROFESSIONAL EXPERIENCE

- **Bowman Law Group, P.C. (formerly Horton, West & Bowman LLP)**, Oakland, CA (September 2021—June 2024)
Represented trustees and personal representatives in the administration of trust and probate estates by guiding clients through each step of the administrative process, from assumption of fiduciary duties and marshalling of assets to funding of subtrusts and distribution of assets to beneficiaries. Prepared foundational and advance estate plan documents, from basic revocable trusts to special needs and charitable split interest trusts. Advised clients on topics related to their estate planning, such as income, gift, estate, and property tax saving strategies; entity formation; premarital and community property planning; and charitable giving.
- **Johnston, Kinney & Zulaica LLP**, San Francisco, CA (November 2015—June 2021)
Designed and implemented estate plans for an annual average of 200 sets of clients from a variety of backgrounds and needs (high net worth individuals, tech workers with stock options and restricted stock units, cross-border planning, same-sex couples, unmarried couples, couples of disparate wealth levels, clients with unique assets such as art collection and literary works). Managed the paralegal and administrative staff's workflow and work product quality.
- **The Beck Law Group, P.C.**, San Francisco, CA (April 2012—March 2015)
Collaborated with clients through the entire estate planning process, from initial interview to signing meeting. Prepared trusts, wills, powers of attorney, advance health care directives, and other ancillary documents.

EDUCATION

- **LL.M., Taxation (with honors)**, Golden Gate University, San Francisco, CA
- **J.D., University of California College of the Law, San Francisco (formerly U.C. Hastings)**, San Francisco, CA
 - Tax Concentration
 - Senior Articles Editor, *Hastings Business Law Journal*
 - Judicial Extern, Judge Mary Wiss, San Francisco Superior Court, Probate Department
- **B.A., Political Economy of Industrial Societies (with honors)**, University of California, Berkeley, Berkeley, CA
 - Minor: Spanish

VOLUNTEER EXPERIENCE

- Volunteer Income Tax Assistance Program, IRS
 - Prepared income tax returns for low-income taxpayers
- Article Editor, *Trust and Estates Quarterly*

David T. Yu
dyu@hbzlawyers.com

PRESENTATION

- *Introduction to Estate Planning in California*, webinar for LightHouse for the Blind and Visually Impaired (February 2021)

PROFESSIONAL ASSOCIATIONS AND AFFILIATIONS

- State Bar of California, December 2011 (Bar No. 280456)
- East Bay Trusts and Estates Lawyers