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Sonia M. Agee practices in the firm's Business and Transactions Group. She focuses on tax-oriented planning for businesses, corporations, and individuals. Her clients include closely held businesses and corporations, individuals, and start-up companies.

Ms. Agee's advanced tax background is an asset to her clients in the areas of tax planning and counseling, tax audits and litigation, and tax matters related to exempt organizations. Her tax background coupled with her corporate experience is particularly beneficial to her clients in the areas of mergers, acquisitions, and re-organizations. She also has experience handling international estate and income tax planning, including offshore entity formation and transactions.

Ms. Agee assists individuals and businesses with their estate planning needs, including wealth transfer planning, business succession planning, closely held business planning, charitable planning, and tax counseling. She also handles income and estate tax planning for foreign nationals.

Practice Areas

- International
- Corporate Governance/Partnership Disputes
- Corporate Transactions
- Mergers & Acquisitions
- Taxation
- Asset Protection
- Estate Planning & Wealth Management

Education

- Boston University, B.A.
- Temple University, J.D.
- Golden Gate University School of Law, L.L.M.

Court Admissions

- California

- District of Columbia
- Massachusetts
- New York
- US Court of Appeals for the Ninth Circuit
- US Tax Court
- USDC: Northern District of California
- Washington

Memberships & Associations

- Estate Planning Council of Santa Clara County
- Santa Clara County Bar Association

Publications

- Author, Operating Globally, *Smart Business*, December 15, 2011
- Author, Attorney Retirement Plans - Do You Need More Than a 401(k)?, *San Francisco Attorney*, 10/04/2010

News

- Estate and Tax Planners Expect a Bumper Year, *California Lawyer*, March 12, 2010