



Bryan T. San Jose

Associate

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Bryan San Jose is an Associate attorney in the firm's Estate Planning and Personal Services Practice. He concentrates his practice in the areas of estate administration, estate planning, and asset preservation planning.

Mr. San Jose routinely provides counsel to his clients specific to the preparation and execution of irrevocable trusts, revocable living trusts, asset protection trusts, testamentary trusts, restatement of trusts, wills, and elder law and powers of attorney matters.

Education

- J.D., Indiana University Maurer School of Law, Bloomington, Indiana, 2021
- B.A. in History, *Dean's List*, Sam Houston State University, Huntsville, Texas, 2017

Bar & Court Admissions

- Indiana (2021)

Practices

- Estate Planning and Personal Services
- Business Services
- Trust and Estate Litigation

Industries

- Financial Services

Representative Experience

- Drafted purchase agreements for the sale of residential property
- Handled guardianship cases and court hearings
- Prepared revocable living trusts for exempt and non-exempt distributions
- Drafted estate planning documents including irrevocable trusts, revocable living trusts, asset protection trusts, testamentary trusts, restatement of trusts, wills, and powers of attorney
- Served as a personal representative for unsupervised estates



- Counseled clients regarding beneficiary designation forms and management of estates

Professional Associations

- Governance Committee, Anthony Wayne Rehabilitation Center