

# Snell & Wilmer

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## Roger A. Grad, P.C.

Partner | Orange County | Los Angeles

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### Main Bio

Roger Grad's practice is concentrated in complex tax and estate planning for high net-worth individuals and business clients. His practice also includes business and finance law, particularly in the formation of limited partnerships, limited liability companies, general partnerships, corporate mergers, corporate dissolutions, and public offerings. Roger counsels individuals and business clients in tax and estate planning issues involving complex claims in state, federal civil trial, and appellate courts, as well as tax, probate, and bankruptcy courts, and alternative dispute resolution forums. Additionally, he practices entertainment law representing clients in regard to entertainment-related agreements and transactions.

### Education

- University of San Diego School of Law (LL.M.)
- University of the Pacific, McGeorge School of Law (J.D.)
  - Moot Court Honors
- University of California, Los Angeles (B.A.)

### Professional Memberships & Activities

- State Bar of California
- Coastal Mountains Land Trust, Board Member

### Representative Presentations & Publications

- "[New Requirement to File BE-10: Benchmark Survey of U.S. Direct Investment Abroad](#)," Co-Author, Snell & Wilmer Legal Alert (June 2, 2015)
- "[5 Tax Considerations For Doing Biz In Indian Country](#)," Quoted, Law360 (April 14, 2015)
- "[Good News About Tax Relief: TRA 2010 Simplified](#)," Co-Author, Orange County Business Journal, Volume 34, Issue 8 (February 21, 2011)
- "[Why Make Your Next Venture Capital Investment Through a Life Insurance Policy?](#)" Co-Author, Orange County Business Journal, Volume, Issue 37 (September 15, 2008)

### Professional Recognition & Awards

- AV Preeminent<sup>®</sup> Peer Review Rating from Martindale-Hubbell<sup>®</sup>
- Southern California Super Lawyers, Tax Law (2012, 2014-2017)

- The Best Lawyers in America<sup>®</sup>, Tax Law (2007-2011), Litigation and Controversy – Tax (2023-2024), Litigation – Trusts and Estates (2024)

## **Community Involvement**

- Seneca Family of Agencies, Orange County Leadership Board (2015-present)
- UCI Diabetes Foundation, Executive Board Member (2013-present)
- Veteran Tickets Foundation, Board of Directors (2012-present)
- Advocacy Arts Foundation, Founding Board Member (1996-present)

## **Previous Professional Experience**

- Jackson, DeMarco & Peckenpaugh, Contract Partner
- Meserve, Mumper & Hughes, Partner
- Best, Best & Krieger, Associate

## **Bar Admissions**

- California
- Tennessee

## **Court Admissions**

- Supreme Court of California
- United States Court of Appeals, Ninth Circuit
- United States Court of Claims
- United States District Court, Central District of California
- United States Tax Court