

It takes a village...

Our village includes:

- Care Managers
- Bookkeepers
- Tax preparers
- Asset managers
- A wide spectrum of attorneys
- Gerontologists
- Administrative Assistants

When it comes time to make a decision or ask for help, please call us for an appointment. We will be happy to set up an initial complimentary consultation and can provide references and referrals.



Our clients range in age from 7 to 99 years old.

Attorney with more than 30 years of experience in probate, estate and fiduciary services.

California Real Estate Broker

Affiliations:

Professional Fiduciary Association of California
California State Bar
California Probate Referee Association
President East Bay PFAC Chapter 2016-2017

Staff Includes:

Lillan Stone, CFO

Dixie K. Miner
Office & Case Manager

Kathleen Newsom, MBA
Licensed Professional Fiduciary, #934
National Certified Guardian



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Trust & Probate
Administration

Guardian Ad Litem

A fiduciary... is someone who has undertaken to act for and on behalf of another in a particular matter in circumstances which give rise to a relationship of trust and confidence.

Giffen Fiduciary Services

is a qualified team of professionals who can offer you, a family member, a friend or client, responsible guidance and service in matters of trusts, estate administration and guardian ad litem appointments. Each client has distinctive and individual needs. As our personal relationships with our clients grow, so does our respect and understanding of their unique situations.



Franza Giffen, JD

After practicing law for more than 30 years the focus of my practice is now my passion; serving my clients as a fiduciary. Over time many of my estate

clients asked me to manage their affairs. Ensuring that my clients have the best possible living situation with the attention of caregivers, health providers, family and community, assists them and gives them relief from worry along with a neutral party to listen to their deepest concerns.

Our mission is to be a neutral party using compassion and understanding as we manage the assets and care of each of our clients.



Kathleen Newsom

As a licensed, professional fiduciary and active member of the PFAC, my focus is on building mutual trust and acting with integrity for my clients. Managing their

assets is the cornerstone of my practice. I specialize in trust and estate administration throughout the Bay Area. My background includes an MBA from the University of SF, McLaren School of Business in addition to a BA and MA in French language.

Trustee & Successor Trustee

A Trustee is a person selected to follow instructions set forth in a trust agreement. The Trustor, or person whose wishes are expressed in the trust, makes the decision of how all his or her assets are to be managed and distributed. A successor Trustee steps into the shoes of the original Trustor.

Decedent's Estate Administration

This refers to the administration process and closing of a probate or trust estate. Generally, this includes inventorying and appraising the assets, paying and collecting debts, preparing and filing tax returns and distributing according to the Will or Trust.

Guardian Ad Litem

When a party to litigation is incapacitated or a minor, the court frequently appoints a Guardian Ad Litem to represent that person's interests exclusively.



A few words from a recent client...

Franza Giffen was the financial conservator and trustee for my step-mother for three years. We faced a complex legal situation and a hoarding legacy as well as some tricky interpersonal issues. In all our dealings, I found Franza to provide knowledgeable and organized service in a kind and compassionate way. — Mimi P., CA