

Jason Fulton

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Trust & Estate Planning ♦ Probate & Litigation ♦ Corporate & Business Law

Strategic, full service business attorney with superior ROI through focused client development, efficiency, service and retention. Successful directing multiple, concurrent projects and cases from document management through research, drafting and closing paperwork. Practiced in supporting law office administration, servicing voluminous equity partner accounts, realizing business development and exceeding goals ahead of deadlines.

Signature Achievements & Competencies

Assets, Residence & Insurance Trusts	♦ Preparation of trust and estate documents with sophisticated estate planning options, including QPRTs, ILITs, APTs, LLCs
Probate	♦ Successful closing of all probate matters for boutique law firm
Discovery & Law and Motion	♦ Written discovery (including special interrogatories) & law and motion for civil actions including homeowners/HOA disputes and personal injury matters
Civil, Consumer & Criminal Litigation	♦ Debt collection; insurance claim negotiation; DUI resolution
Dispute Resolution	♦ Varied dispute resolution involving actions between corporate directors and officers
Corporation, LLC, PC & Partnership Formation	♦ Counseling of small to medium sized professional & financial services businesses regarding incorporation, Family Limited Partnerships, and other business entities
Commercial Transactions	♦ Preparation, negotiation & execution of purchase-sale agreements; due diligence, operations compliance & regulation for \$2M 1031 Exchange
Corporate Maintenance	♦ Minutes preparation; California FTB and IRS filing & negotiation
Commercial Contracts	♦ Employment, independent contractor & severance agreements; stock option, purchase & shareholder agreements; promissory notes & loan contracts; indemnification & NDAs; LLC operating agreements

Acknowledgements

"We retained Jason for two very different legal situations and are very satisfied with the outcome of both. The first was to have our Family Trust created. The work was thorough and his explanations of what needed to be accomplished on our end, clear and understandable. We are much more comfortable now that ...we will retain as much of our estate as possible due to Jason's work. The second situation was helping us resolve a problem we had with a large purchase that was not delivered satisfactorily. Jason handled all of the communications ... [and] we ended up receiving a very satisfactory outcome with a minimum of hassle."
-- Russ and Julliette xxxx

"We had an outdated revocable living trust that required extensive work to bring up to date - including retaining a lawyer from out of state (Oregon). Jason handled these issues promptly and cost-effectively. We highly recommend." -- Kevin and Rachel xxxx

"We would highly recommend Jason Fulton for your Trust and Estate planning. He was referred to us by close friends, and we were both impressed by his personal and professional approach to our needs. He completely updated our Family Trust and Estate Plan. We are very satisfied with the work he did for us." -- Steve and Dale xxxx

Legal Career History

Law Offices of Jason Fulton, Costa Mesa, CA. 2010 to Present

Principal Attorney | Trust & Estate Planning | Probate | Corporate & Business Law | Business Development

- ❖ Prepare trust and estate documents and sophisticated estate planning options, including analyzing Asset Protection Trust alternatives
- ❖ Implement \$5M Irrevocable Life Insurance Trust (ILIT); evaluate Nevada and Colorado Asset Protection Trust options on client's behalf
- ❖ Advise small to medium sized business owners in the formation of various business entities, including implementing a Family Limited Partnership for a \$13M client
- ❖ Manage a variety of alternative dispute resolutions (ADR) involving actions between corporate directors and officers, homeowners associations and other entities
- ❖ Negotiate with insurance company regarding loss of earnings claim related to auto accident

Logan Retoske, LLP, San Juan Capistrano, CA. 2008 to 2010

Associate | Trust, Estate & Probate Department Manager | Litigation | Tax Planning | Corporate Law

Top annual billing associate, awarded October 2009

Selected to manage the firm's entire Trust, Estate and Probate department

- ❖ Directly developed trust and estate plan clientele for the firm through personal networking contacts
- ❖ Prepared trust and estate plans for, and managed all document tracking and correspondence related to Senior Partner's high net worth clientele
- ❖ Closed all probate matters, including negotiating real property assets between competing beneficiaries, and preparation of agreements resolving same
- ❖ Successfully avoided probate in a matter where client's personal residence was omitted from their trust
- ❖ Prepared all documentation related to Asset Protection Trust for \$55M auto dealership owner client
- ❖ Drafted and prepared complaints, answers and considerable discovery documents, including interrogatories, requests for production of documents, requests for admissions and motions to compel
- ❖ Performed research and drafted briefs for procedural posturing in alternative medicine litigation
- ❖ Effectively managed, made court appearances for, and successfully disposed of two DUI cases
- ❖ Advised clients and prepared formation documents for business entities including corporations, PCs, LLCs and Family Limited Partnerships
- ❖ Prepared and filed three years' past corporate minutes with Secretary of State, taking a non-profit (501c3) corporation from suspended to approved, non-exempt tax status with the California FTB and IRS; successfully negotiating with the CFTB and IRS to significantly reduce tax liability
- ❖ Composed promissory notes, loan contracts and ancillary documents for debtor clients of the firm's Senior Partner, also a CPA
- ❖ Drafted and negotiated legal documents for a variety of sale transactions, including preparation, negotiation and execution of purchase-sale agreements; due diligence, and operation compliance and regulation for \$2M 1031 Exchange

Law Offices of Tony T. Liu, Santa Ana, CA. 2007 to 2008

Law Clerk | Contract Attorney | Business Litigation | Corporate | Family Law

- ❖ Assisted with drafting notices, subpoenas, declarations for additional discovery, motions for summary judgment, demurrers and motions in limine
- ❖ Drafted extensive form and special interrogatories
- ❖ Researched legal issues and prepared correspondence and memoranda

- ❖ Drafted and amended business contracts, agreements for business sale and other corporate documents
- ❖ Prepared petitions for dissolution of marriage, domestic partnership agreements and guardianship matters

Law Offices of Michael R. Adams, Irvine, CA. 2005 to 2008

Law Clerk | Trust & Estate Planning | Probate || Business Law

- ❖ Prepared estate planning documents, including Trusts, Wills, Powers of Attorney, Advanced Health Care Directives, estate schedules and asset tracking and assignments
- ❖ Probated estates from petition to discharge
- ❖ Prepared Articles of Incorporation, Articles of Organization, Minutes, Bylaws, Operating Agreements and various contracts and agreements for corporations, limited liability companies and partnerships
- ❖ Researched legal issues in probate, tax, corporate, LLC, partnership and general business law

Gates, O'Doherty, Gonter & Guy, LLP, Irvine, CA. 2004 to 2005

File Clerk | Law Clerk | Insurance Defense

- ❖ Researched cases in Orange and LA County Courthouses
- ❖ Conducted legal research on case law, statute interpretation and public information
- ❖ Reviewed, updated and prepared case files for litigation

Wang & Patel, Newport Beach, CA. Summer 2004

Law Clerk | Intellectual Property | Immigration | Patent Law

- ❖ Conducted legal research on case and statutory law, including intellectual property law
- ❖ Prepared pleadings and documents for court filing and internal memorandum
- ❖ Reviewed discovery requests and drafted responses to opposing counsel

Technology

Recognized at both corporations and law offices as go-to person for technology and software support

MS Word | MS Excel | PowerPoint | Lexis/Nexis | Westlaw || Amicus | Timeslips | Clio

Education

Doctor of Jurisprudence, 2006, Western State University College of Law, Fullerton, CA

Bachelors of Arts in Economics, University of California, Davis, CA

Professional Affiliations

The State Bar of California | Orange County Bar Association, Trusts, Estates & Business Law Sections

Business Lawyer for Orange County Chapter of Le Tip

Corporate History

Countrywide/Balboa Insurance Group, Irvine, CA. 2000 to May 2004

Senior Compliance Administrator, Legal

- Processed and responded to Department of Insurance and consumer requests
- Analyzed and reviewed policies, forms and certificates of insurance to ensure compliance with state laws, regulations and contractual provisions

First Team Real Estate, Costa Mesa, CA. 1997 to 2000

The premier Southern California real estate firm in the region, providing residential and commercial real estate, title, escrow and mortgage operations from over 60 locations

Executive Administrator

- Developed and drafted preliminary plans for e-business implementation
- Created and produced training materials for companywide programs and services
- Redefined support service positions to streamline job processes
- Tested systems and trained staff and agents on various computer software programs
 - Trained 300 agents on new program to drive targeted sales goals utilizing various computer software programs

Aetna Health Plans of California, Orange, CA. 1994 to 1996

One of the largest health plans in California, covering over 443,000 members through its HMO

Senior Customer Service Administrator

- Researched, analyzed and developed new member management processes and information technology systems for nationwide HMO plans
- Designed and introduced training courses for the Member Management Center for HMO and Managed Health Care Plans

Sunrise Vista Mortgage Corporation, Citrus Heights, CA. 1993 to 1994

Loan Officer

- Analyzed borrower information for qualification compliance
- Processed loans and supervised loan development from commencement through closing
- Marketed mortgage financing for home purchases and refinancing
- Generated new clientele through creative marketing strategies