



Joseph E. Meissner, Esq.

Joseph Meissner is a business transactions and estate planning attorney with The Alvarez Firm, serving clients in Ventura County and Los Angeles County. Joseph is also a CPA and former corporate accountant, and he brings his expertise in accounting and financial analysis to his work limiting tax exposure for high-net-worth individuals and families. Since joining the firm in 2017, Joseph has handled a variety of complex estate planning matters, involving trust vehicles such as SLATs, CRUTs, and IDGTs to reduce clients' taxable estates while ensuring access to needed funds.

Joseph's practice also includes real estate and business transactions work, in which he has coordinated purchases from international buyers, represented clients in Section 1031 like-kind commercial property exchanges, created new business entities and spin-offs, and negotiated business sales.

Estate Planning

- On behalf of US citizens living abroad as foreign taxpayers, worked with team of Delaware counsel and trust company's tax strategy team to draft Spousal Lifetime Access Trusts (SLATs) to distribute qualified small business (QSB) stock before impending acquisition increased company value exponentially.
- Administered \$60 million trust, working with client's CPA and financial advisor to identify funding goals for Survivor's Trust, Exempt Credit Trust, Exempt Marital Trust, and Non-Exempt Marital Trust.

Real Estate

- Guided manager of LLC owned by three siblings on a partial 1031 exchange using a “drop and swap” plan, resulting in sale of a large commercial property under the LLC, with one sibling “cashing out” and the other two rolling proceeds forward into like-kind exchanges under 1031 rules.
- Successfully acquired property in escrow with another buyer by petitioning the court to consider client’s higher offer through the confirmation hearing process in a matter involving an international seller.

Business Transactions

- On behalf of general partner of LLC wishing to sell one of two partnership properties and remain general partner of original LLC, spun off LLC into two separate entities and funded second LLC interest to CRUT for sale, providing income stream for client’s lifetime and 20 years of kids’ lives after death, with remainder to charity.
- Consolidated management of multiple real properties under common control in an LLC.

Joseph earned his Juris Doctor from the University of Nevada, Boyd School of Law after graduating with a Bachelor of Science from California State University, Long Beach. A native of Southern California, Joseph now lives in Thousand Oaks with his wonderful wife, Khadija, and their dog, Vono.