

With her background in law and sociology, Claudia Sangster is uniquely qualified to help families transfer their valuables and values from one generation to the next. She possesses vast technical knowledge in estate, gift, and charitable tax planning accumulated through years spent working in financial services organizations, a nonprofit organization, and in law firms that specialize in estate and charitable planning and probate.

Claudia is a well-regarded expert in the field of philanthropy, having published extensively on the subject, and on topics dealing with ways to prolong family wealth. She speaks extensively at professional conferences and client events, including participation as a panelist at the Milken Institute Global Conference where the discussion focused on philanthropy's role in improving the lives of global communities.

Claudia earned her BA in Sociology from Pepperdine University, graduating Summa Cum Laude. She later graduated Magna Cum Laude with a JD from University of Houston Law Center. Claudia believes that in solving the tough societal problems, each person needs to get involved in their community by giving time, talent and treasure. Toward that end, she co-founded both the Philanthropic Advisors Network of Los Angeles and Los Angeles Social Venture Partners, and also serves on various boards of nonprofits. Assisting clients in their philanthropic planning as well as working with the nonprofit community is why Claudia declares, "I have the best job in the bank!"

Claudia lives in Malibu, CA, surrounded by natural beauty and college students who help provide the conversation and laughter she calls "essential to life."



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