

## Kathleen Castellano

PARALEGAL | SAN DIEGO

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Kathleen is a paralegal in the private client and tax team.

She focuses on complex trust administration, including the preparation of gift, estate and fiduciary income tax returns. Kathleen also prepares BOE forms for entities and trusts related to a death; and assists with trust funding. She has worked with her current team for over 34 years.

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## Education

University of Arizona, B.A. History

University of San Diego, Paralegal Certificate

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## Languages

English

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## Key dates

Year joined: 2015

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