


## Kathleen Castellano

PARALEGAL | RANCHO SANTA FE

 +1 858 400 1309

 kathleen.castellano@withersworldwide.com



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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SECRETARY **JANE BACA**

 +1 858 400 1308

 jane.baca@withersworldwide.com

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### EDUCATION

University of Arizona, B.A. History  
University of San Diego, Paralegal Certificate

### LANGUAGES

ENGLISH

### DATES

JOINED: 2015

Rancho Santa Fe

6050 EL TORDO, PO BOX 2329, CA 92067