

THE MEMORABLE ESTATE ATTORNEY

MARY WHITE'S SIGNATURE ORANGE BRIEFCASE ISN'T THE ONLY REASON PEOPLE REMEMBER HER

BY PETER LEWIS

"Let's pretend you died."

Not the warmest opener, perhaps, but in the case of estate planning attorney Mary White, it can be effective in getting a client's attention.

A sole practitioner in Menlo Park for two decades, White operates out of an office on Sand Hill Road, an address notable for its concentration of venture capitalists.

Many of them are her clients. Average net worth: \$10 million to \$50 million.

White keeps a sofa in her office to help put clients at ease as they discuss the details of their estates. Don't talk about taxes or think about numbers, she tells them. Instead, focus on the people and charities that matter—and whom you might want to appoint as trustee.

"Who's going to stand in your shoes when you're not there and dole out the money and invest the money?" she asks them.

As she runs through various "let's pretend you're dead" scenarios, White says, a client may tell her, "Well, no, I wouldn't let that happen. I have to hold up my hand and say, 'Wait a minute, you're not there.'"

White believes in branding. To that end, she always carries a bright orange leather briefcase, purchased at Hermès Beverly Hills. When she's in the office, it sits next to her desk.

She describes it as "the Birkin bag that Grace Kelly made famous. ... I wanted a color that a man would never get."

The briefcase has become part of her identity, to the point that when she recently walked into a local Wells Fargo branch without it, an employee wanted to know where it was. If she shows up at a convention without it, her colleagues, too, ask for its whereabouts.

"Orangebriefcase" is built into one of her email addresses, as well as a website and cartoons. Yes, cartoons. In 2009, White started contributing articles to the "Advisor" advertising section of *Worth* magazine, a print publication aimed at an affluent audience. She told *Worth*, "Well, no one's going to read the articles. But they may look at a cartoon."

White hired Tom Meyer, who does cartoons for the *San Francisco Chronicle*,



and he turned her ideas into sketches. She wrote the word bubbles. In one of her favorites, a child is trying—unsuccessfully—to open a large present with a tag that reads "Irrevocable Trust." The child complains, "Hey! I can't open this!" The silhouetted image of White replies, "Exactly!"

Estate law wasn't White's original goal. After law school, she set her sights on joining an old-guard San Francisco firm, Pillsbury Madison & Sutro, hoping to focus on real estate law. But what they needed was someone in estate planning.

"I thought, 'Well, I can do that.' I started with the idea that I'd just move over to real estate when an opening came up. And I was there for a couple of months [in estate planning] and I just was hooked."

She stayed for 13 years before branching off on her own.

She has now been doing estate planning for 33 years. She says it's an area of the law viewed by some attorneys as boring. White begs to differ: "I love the work."

"It's very rare that someone sends me a check without a thank-you note," she says. **■**