



Bryan T. San Jose

Associate

Office: Carmel

bsanjose@kdlegal.com

p: 317-238-6258

f: 317-636-1507

Bryan San Jose is an Associate attorney in the firm's Estate Planning and Personal Services Practice. He concentrates his practice in the areas of estate administration, estate planning, and asset preservation planning.

Mr. San Jose routinely provides counsel to his clients specific to the preparation and execution of irrevocable trusts, revocable living trusts, asset protection trusts, testamentary trusts, restatement of trusts, wills, and elder law and powers of attorney matters. Mr. San Jose has a strong passion for drafting documents and navigating complex estates, focusing on creating tailored solutions that address each client's unique needs. He takes pride in ensuring every detail aligns with his clients' goals, providing clarity and peace of mind throughout the estate planning process.

Education

- J.D., Indiana University Maurer School of Law, Bloomington, Indiana, 2021
- B.A. in History, *Dean's List*, Sam Houston State University, Huntsville, Texas, 2017

Bar & Court Admissions

- Indiana (2021)

Practices

- Estate Planning and Personal Services
- Business Services
- Trust and Estate Litigation

Industries

- Financial Services

Representative Experience

- Drafted estate planning documents including irrevocable trusts, revocable living trusts, asset protection trusts, testamentary trusts, restatement of trusts, wills, and powers of attorney
- Drafted purchase agreements for the sale of residential property
- Handled guardianship cases and court hearings
- Prepared revocable living trusts for exempt and non-exempt distributions
- Served as a personal representative for unsupervised estates
- Counseled clients regarding beneficiary designation forms and management of estates

Professional Associations

- Governance Committee, Anthony Wayne Rehabilitation Center
- Strategic Committee Board Member, Anthony Wayne Rehabilitation Center



- Member, Professional Advisor Leadership Council (PALC) (March 2024 – Present), Central Indiana Community Foundation
- Member, Indiana Bar Association