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Rebecca O'Toole

PARTNER | SAN DIEGO

REBECCA.O'TOOLE@WITHERSWORLDWIDE.COM

+1 858 400 1302

SECRETARY MELISSA BURGOS

MELISSA.BURGOS@WITHERSWORLDWIDE.COM

+1 619 564 6124

Rebecca is a partner in the private client and tax team and is the Office Managing Director of the San Diego office.

Rebecca practices in the areas of estate planning, trust and estate administration, charitable giving, and the representation of tax-exempt organizations. She focuses on wealth transfers for successful families, sophisticated estate and gift tax saving techniques, charitable planned giving, business succession planning, complex probate and trust administrations, and resolving estate and gift tax audits. She also regularly represents tax-exempt organizations in formation, organizational, and operational issues.

Rebecca is a Certified Specialist in Estate Planning, Trust & Probate Law by The State Bar of California Board of Legal Specialization. She is also a Fellow of the American College of Trust and Estate Counsel (ACTEC) and a former member of the Executive Committee of the Taxation Section of the State Bar of California.

Rebecca has a Martindale-Hubbell® AV rating. She has also been named a Super Lawyer Rising Star since 2015, a 'Top Lawyer' by San Diego Magazine and has been ranked in The Daily Transcript: San Diego County Top Attorneys.

Talks

- '*Directed Trusts Related to The New Statute in California*,' North County Estate Planning Council San Diego Monthly Membership Meeting - May 7, 2024, speaker
- '*Estate Planning for Blended Families*,' San Francisco Estate Planning Council - January 19, 2023, speaker

- '*Checklist 2020: Your estate plan in an election year*,' Withersworldwide webinar - October 7, 2020
- '*Looking Ahead: Reducing tax burdens with Intentionally Defective Grantor Trusts (IDGTs)*,' Withersworldwide webinar - July 20, 2020
- *'Planning for Families Complicated by Divorce, Re-Marriage, Step-Progeny, and Dysfunction,'* STEP Orange County webinar - June 2020
- *'Professionals Symposium 2020,'* Rady Children's Hospital Foundation, January 2020
- *'The Challenges in Estate Planning for Blended Families: Yours, Mine and Ours'*, North County Estate Planning Council, August 2019
- *'Legal Risk Management for Advocacy Nonprofits in a Time of National Change'*, ABA Equal Justice Conference, 2018
- *'Estate Planning Under the Tax Cuts and Jobs Act'*, MINT Society, Rancho Santa Fe
- *'Implications of the Tax Cuts and Jobs Act'*, Rancho Santa Fe Library Guild, February 2018
- *'Estate Planning Under the Tax Cuts and Jobs Act'*, North County Estate Planning Council, February 2018
- *'Top 12 Troubling Topics that Impact Trust Administration - What Every Planner Should Address,'* North County Estate Planning Council, Rancho Santa Fe, CA, March 2017
- *'Hot Topics in Estate Planning'*, North County Estate Planning Council - 2014
- *'QTIPs: A Necessary Item In the Repertoire'*, Annual Meeting of the California Tax Bar and California Tax Policy Conference - October 2016
- *'No Strings Attached: Basics of Tax Gifting'*, State Bar of California 89th Annual Meeting - September 2016
- *'What Attorneys Need to Know About Serving on Nonprofit Boards'*, Napa County Bar Association - September 2016
- *'The Win-Win of Charitable Planning With Non Cash Assets'*, California State Bar, Estate and Gift Tax Conference - February 2016
- *'What Every Domestic Estate Planner Should Know About International Estate Planning'*, Annual Meeting of the California Tax Bar and California Tax Policy Conference - November 2015
- *'A Primer for Attorneys Serving on Nonprofit Boards'*, San Diego County Bar Association - September 2015
- *'Financial Preparedness: Seven Things Every Woman Needs to Know'*, Rady Children's Hospital Women's Financial Symposium - February 2015
- *'Understanding Charitable Lead Trusts: Considerations and Consequences'*, California State Bar Business Law Section's Nonprofit Organizations Committee Meeting - May 2013
- Delegate, Taxation Section of the State Bar of California Annual Washington D.C. Delegation - May 2013
- *'Trustee Duties and Trust Administration'*, Women's Financial Workshop, San Diego, California - October 2012

External publications

'Regulation of Fundraising' (Chapter 13, 2d Edition) (Chapter 14, 3d Edition); Advising California Nonprofit Corporations' (CEB), co-author

'Treasury Makes Waves with New Valuation Discount Proposals', Tax Notes, Volume 153, Number 1 - October 2016, author

'How Community Property States Are Different', Barron's Penta Daily - June 2016, quoted

'California Now Requires that Public Charities Disclose "significant donor" Information to California Attorney General,' Withers Bergman Legal Alert - August 2015, author

'How Much is 'Almost All?': The Case for Keeping the 'Math' in the Otherwise Mathematical Public Support Equation', Tax Notes Today - July 2013, author

Admissions

State of California, 2006

Education

University of San Diego School of Law, cum laude, Order of the Coif, J.D.

University of Arizona, cum laude, B.A.

Languages

English

Memberships

The American College of Trust and Estate Counsel, Fellow

Rady Children's Hospital Foundation, Executive Committee

North County Estate Planning Council

Rancho Santa Fe Literary Society

Rancho Santa Fe Foundation, Professional Advisor Council

Taxation Section of the State Bar of California, Former Member of the Executive Committee

San Diego County Bar Association, Trusts and Estates and Taxation Sections, Member

State Bar of California, Trusts and Estates and Taxation Sections, Member

LEAD San Diego, IMPACT San Diego Program

Alzheimer's Association San Diego, Former Member of the Board of Directors

Key dates

Year joined: 2015
Year became partner: 2016

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