

Whitney Barton

KNOWLEDGE LAWYER | SAN DIEGO



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Whitney is a knowledge lawyer in the private client and tax team.

She advises members of the private client and tax, trust and succession teams on legal developments relating to trusts and tax planning. Her work involves a wide range of client initiatives and focuses on tax, trust, estate planning, probate and trust administration for high net worth individuals and their families. Whitney is experienced in developing and maintaining legal precedents addressing gift, estate and generation-skipping tax structuring, international tax planning issues and charitable giving. She also provides technical know-how, training and commentary on trust and estate law for colleagues and clients, as well as knowledge management services within the firm.

Whitney is recognized as a "key lawyer" by The Legal 500 US in 2021 in the area of nonprofit tax.

Admissions

California

Education

University of San Diego, LL.M. Taxation

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

Princeton University, B.S.

Languages

English

Spanish

Memberships

San Diego County Bar Association

North County Estate Planning Council

Key dates

Year joined: 2020

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