

Josefina Colomar

PARTNER | NEW YORK

 JOSEFINA.COLOMAR@WITHERSWORLDWIDE.COM

 +1 212 848 9878

SECRETARY ROSA MARRERO

 ROSA.MARRERO@WITHERSWORLDWIDE.COM

 +1 212 848 9805



Josie is a partner in the private client and tax team.

She focuses on tax and estate planning for high net worth international and domestic individuals, with a concentration on wealth management and succession structures for international families. She has experience advising on a broad range of tax issues including US transfer tax rules affecting US and non-US residents, income taxation rules affecting non-US trusts and their beneficiaries, and pre-immigration and expatriation planning.

Talks

- "What US and international taxpayers need to know about Biden's tax policy proposal (Green Book)," STEP Mexico presentation - July 28, 2021, co-speaker
- "[Trusts and Continental law: is this marriage possible?](#)," International Association of Young Lawyers - November 14-16, 2019 (Geneva), moderator
- "Private Client Taxation and Wealth Planning" Multi-module training program for Fideuram Intesa San Paolo Private Banking - February through May 2021, co-speaker

External publications

'[Moves and Appointments](#),' Notes, July 2019, quoted

'[Cuba: Fine to stormy](#),' Offshore Investment - July/August 2017, co-author

Admissions

State of New York, 2011

Education

Brooklyn Law School, J.D.

University of Central Florida, B.A.

Languages

English

Spanish

Memberships

New York City Bar Association

Association Internationale des Jeunes Avocats (International Association of Young Lawyers)

Society of Trust and Estate Practitioners

Key dates

Year joined: 2015

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