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

She focuses her efforts on estate planning, planned giving and tax-exempt organizations. Elizabeth represents clients in matters related to family wealth transfers for large estates, sophisticated estate and gift tax saving techniques, charitable planned giving, and complex probate and trust administrations. She also regularly represents tax-exempt organizations in formation, organizational and operational issues.

Elizabeth is certified by the California Board of Legal Specialization as a legal specialist in Estate Planning, Trust and Probate Law and a fellow in the American College of Trust and Estate Counsel (ACTEC). She received the 2019 Distinguished Service Award from the Los Angeles Council of Charitable Gift Planners, where she has served as president and has been a member for 15 years.

Elizabeth is a graduate of Wheaton College (IL) and the UCLA School of Law where she served as Executive Editor of the UCLA Law Review. After law school, she clerked for Judge Wiley Y. Daniel of the Federal District Court in Colorado. Elizabeth is currently adjunct faculty at the UCLA School of Law teaching Estate and Gift Tax and Estate Planning.

Elizabeth serves on the board of the Heifer International Foundation, supporting the work of Heifer International to end hunger and poverty around the world by providing livestock and training to struggling communities.

Talks

- *'Estate Planning with 529 Education Savings Accounts,'* Fairbanks Estate Planning Council - March 20, 2023, speaker
- *'Is Your Gift Up for Grabs? Avoiding the Risk of Forfeiture Following the Breslin Case,'* Los Angeles Council of Charitable Gift Planners - March 16, 2023, speaker
- *'Women Forging Change - International Women's Day 2023,'* Heifer International Session - March 9, 2023, speaker
- *'Charitable Planning - Developments and Trends Affecting Forms 706 and 709,'* IRS Estate and Gift Attorneys Presentation - December 7, 2022, speaker
- *'Hot Topics: New Things for Seasonal Practitioners!,'* USC Trusts and Estates Conference - November 9, 2022, speaker
- *'The Art and Science of Gifts of Tangible Personal Property,'* Beverly Hills Bar Association - August 16, 2022, speaker
- *'"So, You Want to Give Us Your Picasso?" How to Recognize the Benefits and Pitfalls of Gifts of Art,'* Western Regional Planned Giving Conference - May 2022, speaker
- *'Estate Planning for Legacy,'* KPCC and LAist - May 18, 2022, speaker
- *'Expanding Hope: City of Hope Orange County Preview & 2022 Estate and Tax Planning Update,'* Legacy of Hope Society Webinar - March 16, 2021, speaker
- *'Creative ways to help clients with donor advised funds,'* Inland Empire Community Foundation's Professional Advisors Council Meeting - June 30, 2021, presenter
- *'Structuring Gifts to Achieve and Maximize Social Impact,'* Western Regional Planned Giving Conference - April 28, 2021, presenter
- '*Love in the Time of COVID-19: Trustee and Beneficiary Harmony in Years Like 2020*,' USC Gould School of Law 46th Annual Trust and Estate Conference - November 13, 2020, panelist
- '*Looking Ahead: Key benefits of Grantor Retained Annuity Trusts (GRATs)*,' Withersworldwide webinar - July 6, 2020, co-presenter
- *'Fundraising During the Coronavirus Pandemic,'* virtual panel at Western Regional Planned Giving Conference - June 25, 2020, panelist
- *'Introduction to estate planning,'* Jewish National Fund - May 14, 2020, speaker
- *'Are you feeling inSECURE? How to show you CARE in the age of COVID-19'* Inland Empire Community Foundation - May 5, 2020, speaker
- *'Are you feeling inSECURE? How to show you CARE in the age of COVID-19,'* San Gabriel Valley Bar Association - April 27, 2020, speaker
- *'Facilitating Philanthropy Using Charitable Gift Annuities and Donor Advised Funds,'* Motion Picture and Television Fund Event - August 29, 2019, speaker
- *'Lessons Learned from a Collective Century of Planned Giving Experience,'* Western Regional Planning Giving Conference - May 31, 2019, speaker
- *'Navigating the Twists and Turns of Testimentary Gift Annuities'* and *'Lessons Learned from a Collective Century of Planned Giving Experience,'* Western Regional Planning Giving Conference - May 31, 2019, speaker
- *'Probate: Everything You Need to Know,'* National Business Institute Seminar, Long Beach - December 13, 2018, presenter
- *'Foreign Trusts: What You Don't Know Can Hurt You,'* STEP San Diego - November 13, 2018, co-presenter
- *'Planned Giving when you're not a Planned Giving Officer,'* Association of Fundraising Professionals, Los Angeles Regional Philanthropy Conference - November 7, 2018, co-presenter
- *'Flexible Trust Structuring Across Generations,'* Financial Management for the Family Office Conference at Pepperdine - September 26, 2018
- *'Navigating the Trusts and Turns of Testamentary Gift Annuities,'* Los Angeles Council of Charitable Gift Planners - September 20, 2018
- *'Lessons Learned from a Collective Century of Planned Giving Experience,'* Western Regional Planned Giving Conference, Costa Mesa - June 1, 2018, presenter

- *'Flexible Trust Structuring Across Generations,'* AFOG meeting, Los Angeles - May 3, 2018
- *'Foreign Trusts: What You Don't Know Can Hurt You,'* ABA Section of Taxation 2018 Midyear Meeting, San Diego - February 10, 2018, co-presenter
- *'Charitable Giving Update,'* 2017 Western Conference on Tax Exempt Organizations, Los Angeles - December 01, 2017, speaker
- *'Foreign trusts: Classification, tax and reporting implications'*, STEP International Estate Planning Conference Wyoming - September 15, 2017, speaker
- 'California Fiduciary Taxation' with Alexander M. Popovich, California State Bar Association Taxation Section, May 12, 2016
- 'Moving to Paradise - What You Need to Know about Your Clients' Estate Plans When they Move from California to Hawaii' with Rhonda L. Griswold, University of Hawaii, April 29, 2016
- 'Fundamentals of Succession & Estate Planning' Paychex and Integrity Financial, April 27, 2016
- 'California: A Taxing Place for Trusts' with Alexander M. Popovich, USC Tax Institute, Los Angeles,CA, January 2016
- 'Relationships between Trustees and Beneficiaries: How to Avoid Conflicts' with Stephen C. Minana and Kenneth E. Petersen, Jr. 41st Annual USC Trust and Estate Conference, Los Angeles, CA, November 2015
- 'Opening the Door to Opportunity: How Charitable Gifts of Appreciated Real Estate Benefit Property Owners and the Charities they Support' Symposium hosted by Caltech, Huntington Hospital, Methodist Hospital and The Henry E. Huntington Library and Botanical Gardens, Pasadena, CA, November 2015
- 'When a Bequest Matures: Navigating the Process, Pitfalls and Best Practices for a Smooth Transition' Western Regional Planned Giving Conference, Costa Mesa, CA, May 2015
- 'Strategies and Contemporary Issues in Planning with Grantor Trusts' USC Tax Institute, Los Angeles, CA, January 2015
- 'Competing, Collaborating and Cultivating - Opportunities to Attract Gifts from Donors with Private Foundations' with Steven J. Chidester, Western Regional Planned Giving Conference, Costa Mesa, CA, May 2014
- 'Recent Developments in Charitable Planning' The Jerry A. Kasner Estate Planning Symposium, Santa Clara, CA, September 2013
- 'Professional Advisor and the Charitable Gift Annuity' Northwest Planned Giving Roundtable's 25th Conference, Portland, OR, September 2013
- 'The Opportunity of a Lifetime: Maximizing the Charitable Impact of a Liquidity Event' California Community Foundation, Los Angeles, CA, May 2012
- 'Fallow Ground or Fertile Soil? The unrealized potential of charitable real estate gifts' Glendale Estate Planning Council, Glendale, CA, February 2012
- 'Ask the Experts Panel: Advanced' Western Regional Planned Giving Conference, Costa Mesa, CA, June 2011

External publications

'*Is Forever Really Forever? Question May Be Answered in Lawsuit Over UC Hastings Name Change*,' ABA Journal - October 13, 2022, quoted

'*Anne Heche's Son Seeks Control of Her Estate*,' WealthManagement.com - September 7, 2022, quoted

'*Part 3: Estate Planning with 529 Educational Savings Accounts*,' Withers Insight - August 24, 2022, author

'*Part 2: Estate Planning with 529 Educational Savings Accounts*,' Withers Insight - August 24, 2022, author

'*Part 1: Estate Planning with 529 Educational Savings Accounts*,' Withers Insight - August 11, 2022, author

'*Ways Clients Can Help Their Children Buy a House*,' Withers Insight - June 21, 2022, author

'Final Anti-Clawback Regs Give Estate Planners Green Light,' Tax Notes, November 26, 2019, quoted

'Preparing for Sunset - what every lawyer needs to know about the gift and estate tax,' Daily Journal's 'Wealth with Withers' column, June 25, 2019, author

'Withers update on California and federal legislative activity affecting estate taxes,' Insight __ - June 19, 2019, co-author

'*Navigating the twists and turns of testamentary gift annuities*,' Planned Giving Today, January 2019, author

'Impact of tax reform on tax-exempt organizations paying compensation in excess of US $1 million,' Withers Insight - December 21, 2017, co-author

'*Shoes for the Cobbler's Children: What Lawyers Need to Know About Estate Planning*', The Recorder, May 4, 2016, co-author with Dina Y. Nam

'How Wealthy Individuals Can Strategically Gift Education,' Family Wealth Report, December 10, 2015 edition, co-author with Dina Y. Nam

'Strategies and Contemporary Issues in Planning with Grantor Trusts,' __ 67-14 USC Law School Institutes On Major Tax Planning (2015), co-author with Dina Y. Nam

'Accomplishing Clients' Estate Planning Goals in a Post-ATRA Environment in Best Practices for Structuring Trusts and Estates,' __ Aspatore Books, a Thomson Reuters business (2015 ed.)

'Planning for Non-Traditional Families,' In Mittra, Sid, Sahu, Anandi, and Starn, Jr., Harry (Eds.), Practicing Financial Planning for Professionals, American Academic Publishing (11th ed., 2012)

Admissions

State of California, 2000

State of Arkansas, 2017

Education

UCLA School of Law, J.D.

Wheaton College (IL), cum laude, B.A.

Languages

English

Memberships

American Institute for Philanthropic Studies Certified Specialist in Planned Giving program faculty (2019-present)

American College of Trust and Estate Counsel (ACTEC), Fellow (2014-present)

American College of Trust and Estate Counsel (ACTEC), Charitable Planning Committee

American College of Trust and Estate Counsel (ACTEC), Legal Education Committee, Co-Chair

USC Trust and Estate Conference Planning Committee, member

Los Angeles County Bar Association, Exempt Organization Section, Chair (2015-2016)

Ronald Reagan Presidential Foundation, Professional Advisory Council (2010-2015)

Beverly Hills Bar Association, Trusts and Estates Section, Chair (2009-2010)

Beverly Hills Bar Association, Executive Committee of Trusts and Estates Section (2005-2009)

Partnership for Philanthropic Planning of Greater Los Angeles, Past President (2007)

Western Regional Planned Giving Conference, Conference Chair (2005)

Key dates

Year joined: 2015
Year became partner: 2015

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