withersworldwide

Joy C. Chang

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

She assists families and individuals in the tax-efficient transfer of wealth. Her practice includes estate and gift planning for domestic and international clients, charitable giving, and probate and trust administration. She assists families and individuals at all stages of life, from drafting the initial estate plan, implementing lifetime gifts and charitable planning, providing advice and counsel for use of sophisticated estate and gift tax saving techniques, to advising fiduciaries in post-mortem trust and probate administration.

Joy counsels domestic and international families on cross-border issues. She advises clients with assets that are located in multiple jurisdictions or those with cross-border interests or beneficiaries, and counsels individuals planning to enter or leave the United States. Joy also provides tax compliance advice for persons with foreign trusts, foreign bank accounts, or other foreign assets and entities, including advice regarding participation in the offshore voluntary disclosure or streamlined disclosure programs.

She also assists clients in forming public charities and private foundations and obtaining tax exempt status, and advises nonprofits in their ongoing operations.

Joy is is a certified specialist in estate planning, trust and probate law by the State Bar of California Board of Legal Specialization. She has been ranked on *Legal Week's* Private Client Global Elite "Ones to Watch" lists since 2017 and as a Super Lawyers Rising Star in 2015.

SECRETARY **CARLY MYERS** +1 415 872 3217 carly.myers@withersworldwide.com

TRACK RECORD

Legal Week Private Client Global Elite: One to Watch 2017-2021

Super Lawyer Rising Star 2015

San Diego Business Journal 'Best of the Bar' 2015

Recipient of State Bar of California's Wiley W. Manuel Award for Pro Bono Legal Services - 2006

ADMISSIONS

- State of California, 2005

PUBLICATIONS

'Law360 Names Attys Who Moved Up the Firm Ranks in Q3,' Law360, November 1, 2018, featured

'How Much is "Almost All?": The Case for Keeping the 'Math' in the Otherwise Mathematical Public Support Equation Proposed Guidance Under Treasury Regulation §1.170(A)-9(f)(7)(iii)', Tax Notes Today, July 2013, author

'How Deductible is that Kitty in the Window? The Deductibility of a Volunteer's Unreimbursed Animal-Care Expenses' , ABA Animal Law Committee Newsletter, Fall 2011, author

'Warren Buffett's $37 Billion Surprise', San Diego Lawyer, March and April 2007, co-author

MEMBERSHIPS

- San Diego County Bar Association - Estate Planning, Trust and Probate Law Section and International Law Section
- Society of Trust and Estate Practitioners – Registered Trust and Estate Practitioner
- Pan Asian Lawyers of San Diego
- Alumni Association Board of Governors, U.C. Hastings College of the Law, 2007 to 2010, 2016 to present
- UC Hastings College of the Law Planned Giving Advisory Board
- San Diego County Bar Foundation Board of Directors
- Scripps Health Foundation Gift Planning Advisory Board, 2012-2018
- KPBS Planned Giving Advisory Committee, 2012-2018
- California State Bar Taxation Section Washington, D.C. Delegation, 2013 Delegate
- Law Library Justice Foundation Board Member, 2007 to 2010

TALKS

'Ethics Roundtable,' ALI CLE International Trust and Estate Planning 2019, Washington, D.C. - November 14, 2019, panelist

'Planning and Ethics Issues for the International Estate Planner,' ALI CLE International Trust and Estate Planning 2019, Washington, D.C. - November 14, 2019, panelist

'Tax-advantaged Charitable Giving,' UC Hastings Golden Society - October 18, 2019, speaker

'What You Don't Know Can Hurt You: Tax Traps for Foreign Persons Investing in Silicon Valley,' HLB Asia Pacific Conference, Redwood City, CA - June 21, 2019, speaker

'The Changing Face of High Net Worth in Asia,' M International Advisors Conference, Miami, Florida - May 21, 2019, panelist

'Cross-Border Planning: Tips for Domestic Planners Facing Increasingly Global Clients,' Sacramento Estate Planning Council - November 14, 2018, speaker

'Women in Law,' Women's Museum of California and UC Hastings College of the Law - October 23, 2018, moderator

'Charitable Giving Options and Tax Law Changes,' UC Hastings College of the Law - October 19, 2018, panelist

'Current Trends in Representing Clients from Greater China,' Morgan Stanley International Client Advisor's Symposium, San Diego, California -

September 15, 2017, speaker

‘Tax Planning Considerations for Non-U.S. Persons with U.S. Assets’, Jerry A. Kasner Estate Planning Symposium, Santa Clara, California - September 7, 2017, speaker

‘Traps for the Unwary: Issues to Consider in Cross-Border Fiduciary Litigation and Trust or Probate Administrations’ , Topics in International Estate Planning, 2017 SFEPC & GGU Law Morning Symposium, San Francisco, California - June 2017, co-presenter

‘Understanding the Real Needs of Wealth Owning Families Connected to Asia: Focus on Greater China and Links with U.S.’ , STEP International Tax and Estate Planning Forum: Around the Globe in 2017, Laguna Beach, California - May 2017, panelist

‘Yours, Mine, Ours: California Marital Property, Characterization and Consequences,’ North County Inland CalCPA, San Diego, California - September 2016, speaker

‘Tax and Estate Planning for Non-resident Aliens and Immigrants’ , Financial Planning Association of Orange County, Allied Professionals Summit, Newport Beach, California - September 2016, speaker

‘Estate Planning for Foreign Assets’, San Diego County Bar Association, San Diego, California - May 2016, co-presenter

‘Planning Considerations for U.S. Persons Investing in Foreign Real Property,’ Society of Trust and Estate Practitioners (STEP) San Diego Chapter meeting - September 2015, speaker

‘Strategies for Wealth Transfer to the Next Generation,’ Taiwanese-American Chamber of Commerce - Los Angeles Business Expo, City of Industry, California - September 2013, speaker

‘Gift and Estate Planning for the Mainland Chinese Client,’ Society of Trust and Estate Practitioners (STEP) San Diego Chapter meeting - July 2013, co-presenter

‘How Much is "Almost All?": The Case for Keeping the ‘Math’ in the Otherwise Mathematical Public Support Equation,’ California State Bar Taxation Section Washington, D.C. Delegation, Washington, D.C. - May 2013, co-presenter

‘Trustee Duties and Trust Administration,’ Women’s Financial Workshop, San Diego, California - October 2012, speaker

‘Nuts and Bolts of Drafting: Statutory Requirements and Elements of a Good Dispositive Document,’ Drafting and Designing Revocable Trusts in California, Mentor Legal Drafting Courses sponsored by City National Bank and The San Diego Foundation, San Diego, California - October 2011, speaker

‘Current Trends on International Tax Planning”, Current Trends in International Cross Border Planning; Investing in a Transparent World, presented by Amicorp, San Diego, California - July 2011, panelist

‘How to Manage the Estate Planning Process,’ Healthy, Wealthy, and Wise presented by Scripps Health Foundation and Luce Forward, Carlsbad, California - March 2010, speaker

EDUCATION

Georgetown, cum laude, (Foreign Service), B.S.
L'Université Lyon III, Jean Moulin, DEUF
National Chengchi University, Graduate School of Diplomacy, Fellowship
University of California, Hastings College of the Law, cum laude, Thurston Society, J.D.

LANGUAGES

ENGLISH

MANDARIN

DATES

JOINED: 2015

RECOGNITION

2020-21 Private Client Global Elite Ones to Watch Recognized Joy Chang

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2017-2018 Legal Week US Private Client Global Elite Recognized Joy Chang

2017-2018 Legal Week US Private Client Global Elite Recognized

2016 Super Lawyers US Rising Star Joy Chang

2016 Super Lawyers US Rising Stars Individual

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