

Carol K. Kao

PARTNER | RANCHO SANTA FE, SAN DIEGO

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

She has provided confidential personal estate and tax planning services to private clients for over 25 years. She focuses on wealth transfers for successful families, sophisticated estate and gift tax saving techniques, charitable planned giving, family private foundations, business succession planning, complex probate and trust administrations, and resolving estate and gift tax audits. Prior to joining Withers, Carol was a partner in the law firm of Luce Forward Hamilton & Scripps LLP/McKenna Long & Aldridge LLP. She was also a certified public accountant with Arthur Andersen before starting her legal career.

She has been named as one of the 'Best Lawyers in America' since 2006. She has also been named one of 'Southern California Super Lawyers,' and ranked as one of the 'Top 25 Women Attorneys' and one of the 'Top 50 Attorneys' in San Diego by San Diego Super Lawyers. She has a Martindale-Hubbell® AV Rating and has been ranked in The Daily Transcript: San Diego County Top Attorneys, as well as being a recipient of State Bar of California's Wiley W. Manuel Award for Pro Bono Legal Services and the San Diego Volunteer Program's Distinguished Service Award.

SECRETARY **LYNSEY BOATMAN**

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ADMISSIONS

- State of California, 1991

PUBLICATIONS

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

'Long Term Care', San Diego Super Lawyers profile - 2011

MEMBERSHIPS

- California State Bar
- California State Bar Tax-Exempt Organizations Committee
- American College of Trust and Estate Counsel
- Certified Public Accountant, California (Inactive)
- Planned Giving Committee of University of California, San Diego
- Board of Directors and Secretary of Make-a-Wish Foundation of San Diego

- La Jolla Estate Planning Trust and Probate Section

- San Diego County Bar Estate Planning Trust and Probate Section

- San Diego County Bar Association

- Pan Asian Lawyers of San Diego

TALKS

- 'ITEP- Income Tax for Estate Planners'*, UCLA/CEB Estate Planning Institute

- 'Trustee's Discretion- The Spectrum'*, San Diego County Bar Estate Planning, Trust and Probate Law Section

- 'Family Limited Partnerships- What's Next?'* San Diego County Bar Estate Planning, Trust and Probate Law Section

- 'Administration From Start to Finish'*, National Business Institute Panelist

- 'Recent Developments- Family Limited Partnerships'*, California State Bar, Taxation Section, Annual Meeting

- 'Power of Attorney'*, California CEB Panel Presentation

- 'Private Foundations- Clarification of Self-Dealing Rules'*, California State Bar Taxation Section Washington DC Delegation

EDUCATION

UCLA, cum laude, B.A.
 USC, J.D.

LANGUAGES

ENGLISH

DATES

JOINED: 2015
 PARTNER: 2015

RECOGNITION

2016 Top 50 Super Lawyers - Kao	2016 Top 25 Women Super Lawyers - Kao	2018 Super Lawyers - Kao	2017 Super Lawyers - Kao
Carol K Kao PR AV 250 (1)	Best Lawyer 2020	ACTEC Fellow logo web	2019 Super Lawyers Kao
2019 Best Lawyers - Kao	2019 Best Lawyers Kao	Recognized by Best Lawyers 2018 - Jeremy Crickard	2017 AV rating - Reynolds
2017 Best Lawyers - Kao	2016 Best Lawyers - Kao	2015 Best Lawyers - Kao	2014 Best Lawyers James Cowley

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