

Helen S. Cheng

PARTNER | SAN DIEGO, SAN FRANCISCO

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

She is a trusts and estates attorney who focuses on exempt organizations and international tax planning for inbound and outbound transactions. She assists clients in all aspects of estate planning, estate and trust administration and charitable planning.

Helen brings a diversity of experience to her clients. After graduating from Stanford Law School, she practiced international corporate tax law in China and California where she worked with multinational corporations, such as Oracle, Intel and Seagate, on sophisticated international tax planning techniques. Helen is also certified as a specialist in estate planning, trust, and probate law by the State Bar of California Board of Legal Specialization.

Previously, Helen worked at the San Diego Zoo to create its licensing and technology transfer program. She was directly responsible for the creation of the San Diego Zoo Global Centre for Bioinspiration and worked with companies such as Procter & Gamble, WD-40, Nike and Qualcomm to develop technologies inspired by nature.

Helen currently serves as chair of the Society of Trust and Estate Practitioners San Diego Branch (STEP SD) and on the STEP USA board of directors. She is also general counsel for the International Community Foundation and a board member at the Balboa Art Conservation Center.

SECRETARY **LYNSEY BOATMAN**

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ADMISSIONS

- State of California, 2000

PUBLICATIONS

'Considerations for making charitable gifts abroad,' Daily Journal's "Wealth with Withers" column - March 29, 2021, co-author

'UBTI Proposed Regulations Answer Some Questions but Raise Others,' Tax Notes - July 13, 2020, co-author

'New tax legislation establishes flat tax on investment income of private foundations,' Thomson Reuters' Taxnet Pro - January 30, 2020, co-author

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

'Proposal to enhance implementation, enforcement of exit tax,' __ Tax Notes - November 13, 2017, co-author

'Consider the private operating foundation,' __ Wealth Management's Trusts & Estates Magazine - October 2017, co-author

MEMBERSHIPS

- STEP San Diego, Branch Chair

- STEP USA, Board of Directors
- International Community Foundation, General Counsel
- Balboa Art Conservation Center, Board Member
- San Diego County Bar Association, Taxation Section, Member and Former Chair
- Global Imprints, LLC, Advisory Council Member
- State Bar of California, Member

TALKS

'Wine Not? California's Decanting Act,' Estate Planning and Trust Council of Long Beach - June 3, 2021, co-presenter

'An Introduction to International Estate Planning: Proper Planning to Protect Assets, and to Avoid Unnecessary Taxes and Disputes,' Probate Attorneys of San Diego webinar - April 21, 2021, co-presenter

'Wine Not? California's New Decanting Act,' San Luis Obispo County Bar Association webinar - February 24, 2021, co-presenter

'Powers of Appointment: Everything You Need to Know From the Planning and Litigation Perspectives,' Orange County Bar Association, Trusts & Estates Section webinar - August 12, 2020, co-presenter

'International Estate and Gift Taxation,' American Bar Association Real Property, Trust and Estate Law Section (ABA RPTE) webinar - September 17, 2019, co-presenter

'California's New Trust Decanting Laws,' Long Beach Bar Association Probate, Trust & estate Planning Section - May 1, 2019, speaker

'Wine Not? California's New Decanting Act,' First American Trust – January 28 and February 6, 2019

'Ethics Course: Cir. 230 Developments and Changes in Tax Practice Before the IRS,' California Bar Association Annual Income Tax Seminar - June 2014

'The Rare and Wonderful World of...International Tax,' California Society of Enrolled Agents, Palomar - May 2014

'FATCA, FBAR, Foreign Trusts... Oh My! US tax reporting traps for the unwary,' California Society of Enrolled Agents, Palomar - August 2013

EDUCATION

Stanford University Law School, J.D.
University of Kansas, B.A.

LANGUAGES

ENGLISH

DATES

JOINED: 2015

San Diego

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San Francisco

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