withersworldwide

Megan L. Jones

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Megan is an associate in the private client and tax team.

She focuses her practice on advising companies, investors, family offices and individuals on sophisticated domestic and international tax planning. Megan guides clients on tax and corporate planning arising from the acquisition, disposition and restructuring of businesses, corporations and partnerships both domestically and internationally. Megan frequently advises foreign individuals moving to the U.S. on pre-immigration, income, gift and estate tax planning opportunities, along with helping those leaving California or the United States.

Megan also focuses her practice in the technology arena, including crypto assets and block chain technology. Megan's expertise includes advising startup companies and their founders, from the foundational stages to a recognition event. Megan understands how to plan in the context of intangibl assets or innovative technology. Her grasp of complex financial statements adds a level of sophistication to her practice.

Previous experience includes working for a globally focused investment bank, doing mergers and acquisitions and public offering work. Megan is an adjunct professor at USC Gould School of Law and Loyola Law School. She frequently speaks and writes on tax-and other topics, and has written three books. An active member in the legal community, she serves in leadership roles including on the planning committee of the Society of Trust and Estate Practitioners' (STEP) Los Angeles Branch. Megan is on the prestigious USC Tax Institute planning committee. She is also Chair of the tax executive committee at the Los Angeles County Bar Association, and also is a member of both CalCPA's estate planning state and Los Angeles planning committees.

An education advocate, Megan is on the board of directors of the Mr. Holland's Opus Foundation and advises schools on a pro bono and regularly retained basis.

SECRETARY **KATHY WHITE** +1 310 228 5748 Kathy.White@withersworldwide.com

TRACK RECORD

Advised and negotiated the establishment of a celebrity branded company.

Advised on complex succession and tax planning for a 100 year old family business with extensive assets.

Advised on establishment and structure of a family office for a very high net worth family.

Advised on and ran the sale of numerous public and private companies.

Unwound a complex foreign trust with assets in numerous countries, for an individual in the process of moving to the United States.

ADMISSIONS

- State of California, 1995
- United States Tax Court, 2017

PUBLICATIONS

‘*Facing Change: Current Tax and Estate Planning Ideas*,’ NAEPC Journal of Estate & Tax Planning, Issue 35 – September 2020, co-author

‘*Key issues facing corporate clients and potentially impacting transactions,*’ Daily Journal - September 2, 2020, co-author

‘*Federal Banks Get OK to Provide Services for Crypto Assets* ,’ Bloomberg Law - August 20, 2020, co-author

‘*Facing change: Current United States tax and estate planning ideas*,’ Withers Insight - August 11, 2020, co-author

‘*Working Group Seeks Answers on ‘Medical Condition Exception,*’ Tax Notes - May 15, 2020, co-author

‘*Coronavirus Working Group Focuses on International Tax Issues,*’ Tax Notes – May 14, 2020, co-author

‘*Can AI be taxed?*’ Los Angeles Lawyer - May 2020, co-author

‘*Your lenders have called – What should you do now? Insights for US businesses navigating the impact of the coronavirus*,’ Withers Insight - May 5, 2020, co-author

‘*IRS Helps Foreigners Stranded in the United States Due to COVID-19,*’WealthManagement.com - April 29, 2020, co-author

‘*IRS Issues Relief to Foreigners Stranded in the United States due to Coronavirus* ,’ Withers Insight - April 22, 2020, co-author

‘*Alternative investments should be reviewed to address coronavirus related issues* ,’ Withers Insight - March 31, 2020, co-author

‘*Coronavirus: Risk of US tax residency for foreigners stuck in the United States*,’ Withers Insight - March 27, 2020, co-author

‘*Coronavirus impact on US international tax compliance*,’ Withers Insight - March 27, 2020, co-author

‘*Silicon Valley Wins Big With Tax Break Aimed at Small Businesses,*’ Bloomberg BusinessWeek - June 10, 2019, quoted

‘*Qualified Opportunity Zones,*’ NAEPC (National Association of Estate Planners & Councils) Journal of Estate and Tax Planning, Issue 31 – May 2019, co-author

‘*Asset Pouring; California Enacts New Decanting Statute,*’ California CPA Magazine – January 2019, co-author

‘*Foreign Tax Reform Changes Under Tax Cuts and Jobs Act,*’ Daily Journal - January 26, 2018, co-author with Paul Sczudlo

‘*Start-Up Opportunities - The Internal Revenue Code permits the exclusion of certain gains from qualified small business stock,*’ Los Angeles Lawyer - February 2018

‘*Judgment Creditor Not Entitled To Restitution on Reversal,*’ Daily Journal – March 2018

‘*How is the Tax Cuts and Jobs Act Affecting M&A?,*’ Daily Journal – April 16, 2018, co-author

‘*The Myth of College for All – Proposed Estate Tac Won’t Buy “College for All” Californians,*’Los Angeles Daily Journal - May 25, 2018

‘*Finally, Proposed Regulations Regarding IRC Section 199A,*’ Los Angeles Daily Journal – August 16, 2018

'Bring It Home,' Los Angeles Lawyer – September 2018, co-author with Paul Sczudlo

'Impact of New Tax Laws on Collectors,' Heritage Auctions Trusts & Estates Journal – Fall 2018

'New Decanting Law Will Make it Easier to Change Irrevocable Trusts,' Los Angeles Daily Journal - October 16, 2018

'CEB Choice of Entity,' California Business Law Practitioner - Fall 2018

'IRS Issues Proposed Regulations on Gift,' Los Angeles Daily Journal - November 27, 2018

'Law Only Partially Addresses Treatment of Digital Assets,' Daily Journal - 2017

'Notices of Proposed Actions Can Help to Protect Trustees,' Daily Journal - 2017

'Plan Would Turn Flow-through Tax Precedent Upside Down,' Daily Journal - 2017

'Not-for-Profits Must Recognize Funds Earlier,' Daily Journal – 2017

'Guidance on Adding Debt to Tax Basis,' Daily Journal – 2017

'Constructive Trusts Can be Court Imposed to Ensure Equity,' Daily Journal – 2017

'Partnership Audit Procedure Rules Will Change in New Year,' Daily Journal - November 27, 2017

'Creative Trust Options for Holders of Substantial Assets,' Los Angeles Lawyer - December 2017

'Tax Reform in Our Stockings After Senate Bill Passage?' Daily Journal - December 5, 2017

'Tax Cuts and Jobs Act Appears Poised to Become Law,' Daily Journal - December 19, 2017

'Tax Reform Impacts on Estate Planning,' CalCPA - December 22, 2017, co-author

MEMBERSHIPS

- USC Tax Institute Planning Committee
- Los Angeles County Bar Association (LACBA) Taxation Section, Chair
- STEP Los Angeles Planning Committee
- State Bar of California
- Beverly Hills Estate Planning Council
- CalCPAs State Estate Planning Executive Committee

- CalCPAs Los Angeles Estate Planning Executive Committee
- California real estate broker license
- Mr. Holland's Opus Foundation, Board member

TALKS

'*Withers talks: families and family office | Ep 7 - Family offices as direct investors* ,' Withersworldwide podcast - October 8, 2020, speaker

'Been in the U.S. and Now Heading Overseas? How Will this Impact Your Estate & Tax Planning?' Los Angeles Inbound Wealth Planning Council webinar - August 20, 2020, co-presenter

'Tax and Estate Planning for US Persons with Foreign Assets,' Los Angeles County Bar Association - August 4, 2020, co-presenter

'U.S. Tax Residency, COVID-19 and Beyond,' STEP LA Webinar - June 24, 2020, speaker

'Family Office Operations 2020: New Ideas,' Wealth management firm-hosted event - January 24, 2020, speaker

'Artificial Intelligence,' AICPA & CalCPA Entertainment Industry Online Conference - December 13, 2019, speaker

'Family Office Operations 2019: New Ideas,' Large financial institution-hosted event - November 19, 2019, speaker

'VCs, Private Equity and Corporate Investments: The Funding and Accelerating the Content and Technology Marketplace ,' Finance Hollywood, - November 12, 2019, speaker

'Family Office Operations 2019: New Ideas,' Large financial institution-hosted event - September 25, 2019, speaker

'Disasters in Estate Planning & How to Fix Them,' CalCPA, Los Angeles, California - August 14, 2019, speaker

'State Taxation of Trusts and Why To Be Wary of California,' The Accounting and Finance Show, Los Angeles, California - July 23, 2019, speaker

'Artificial Intelligence,' CalCPA Entertainment Industry Conference - June 25, 2019, speaker

'VCs, Private Equity and Corporate Investments: The Funding and Accelerating the Content and Technology Marketplace ,' Digital Hollywood Spring, Los Angeles, California - May 21, 2019, speaker

'When Opportunity Zones Knock, Be Prepared To Answer! How to get in the Zone,' understand your options and identify the risks, Deutsche Bank Trust Company - April 23, 2019, speaker

'Dana Latham Awards Luncheon,' Los Angeles County Bar Association - June 7, 2019, speaker

'Internal Revenue Code Section 199A Overview and Case Studies,' Pasadena Bar Association - March 22, 2019, speaker

'A Look Into the Tax Cuts and Jobs Act; Pass Throughs, Corporate Tax, and Choice of Entity ,' Beverly Hills Bar Association - February 14, 2018, speaker

'Qualifying, Structuring and Restructuring Businesses for the 20% Pass Through Deductions,' Beverly Hills Bar Association - May 1, 2018, speaker

‘VCs, Private Equity and Corporate Investments: The Funding and Accelerating the Content and Technology Marketplace ’, Finance Hollywood - October 16, 2018, speaker

‘Long Term Trusts: How to Plan for Long-Term Family Wealth ’, U.S. Trust - October 17, 2018, speaker

‘Corporation or LLC after the Section 199A Regs’, CalCPAS - November 30, 2018, speaker

EDUCATION

Loyola Law School, LL.M - Tax
Loyola Law School, J.D
Pepperdine University, B.S - Finance

LANGUAGES

ENGLISH

DATES

JOINED: 2019

Los Angeles
1925 CENTURY PARK EAST, SUITE 400, CA 90067