



JULIE M. DEWBERRY

Licensed in California and Virginia, Julie Dewberry's practice focuses on estate planning and tax planning strategies and representing nonprofit organizations, including private foundations and public charities dedicated to a broad array of philanthropic causes.

In her trust and estates work, Ms. Dewberry advises successful families and individuals on the tax-efficient accumulation, preservation, and transfer of assets. She is adept at understanding her clients' values, concerns, and long-term objectives and designs estate plans accordingly. Ms. Dewberry regularly prepares estate plans for clients who want to ensure their young children are cared for upon their deaths and clients who need sophisticated wealth transfer tax planning. Ms. Dewberry is skilled at mitigating interfamily disputes, planning for spendthrift children, and creating practical solutions to novel problems. In addition, she advises beneficiaries and fiduciaries in the administration of trusts and estates.

Her significant experience in tax and estate planning, coupled with her understanding of charitable giving techniques, has informed much of her work with nonprofit organizations. Ms. Dewberry assists nonprofit organizations in formation, obtaining tax-exemption rulings from the IRS and Franchise Tax Board, and ongoing operations. More specifically, her practice includes helping organizations with choice of entity, applications for federal and state tax-exempt status, retroactive reinstatement of tax-exempt status, charitable solicitations, grant making, the unrelated business income tax, the self-dealing rules, contracts, mergers and dissolutions, and executive compensation.

Ms. Dewberry is a member of the Korean American Bar Association of San Diego, the Rady Children's Hospital Foundation Estates and Trusts Council, the Trusts and Estates Section of the San Diego County Bar Association, and the North County Estate Planning Council. Ms. Dewberry is often asked to present at local and national conferences and other events.

Ms. Dewberry hails from Virginia with strong roots in Washington D.C. and Florida. She has been fortunate to work with lawyers and other professionals throughout the United States and keeps an extensive network of contacts for the benefit of her clients.

PRACTICE GROUPS

- ▶ Tax
- ▶ Trusts & Estates
- ▶ Nonprofit Organizations

EDUCATION

- ▶ J.D., George Mason University School of Law (Tax Law Concentration) (2012)
- ▶ B.A., The College of William and Mary (*Cum Laude*) (2009)
- ▶ Visiting Student, University of Oxford, Hertford College (2008)

ADMITTED TO PRACTICE

- ▶ California
- ▶ Virginia

AFFILIATIONS

- ▶ State Bar of Virginia
- ▶ State Bar of California, Trusts & Estates Section and Taxation Section
- ▶ Rady Children's Hospital Foundation Estates and Trusts Council
- ▶ San Diego County Bar Association, Estate Planning, Trust & Probate Section
- ▶ Korean American Bar Association of San Diego
- ▶ North County Estate Planning Council
- ▶ American Bar Association, Section of Taxation, Estate & Gift Taxes

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SPEAKING ENGAGEMENTS

- **Caselaw Updates including IRC Section 408(d) and 2703(b) in Federal Estate, Gift and Fiduciary Income Tax Laws**, *American Bar Association Tax Section Meeting*, January 19, 2024 (Presenter)
- **Current Developments including adequate disclosure and IRC Section 170(f) in Federal Estate, Gift and Fiduciary Income Tax Laws**, *American Bar Association Tax Section Meeting*, October 19, 2023 (Presenter)
- **Recent Developments in Federal Estate, Gift and Generation-skipping Transfer Tax Laws**, *American Bar Association Tax Section Meeting*, October 14, 2022 (Fiduciary Income Tax Section Presenter)
- **Internal Revenue Code Section 677 — The Ghost That Haunts the Divorced Grantor**, *American Bar Association Tax Section Meeting*, September 23, 2021 (Fiduciary Income Tax Section Presenter and Panelist)
- **Ruling Provides Guidance on Grantor Retained Annuity Trusts**, *Daily Journal*, May 19, 2020 (Co-Author)
- **Digital Assets in Probate**, *National Business Institute*, January 27, 2020 (Presenter)
- **Incapacity and End-of-Life Decisions**, *National Business Institute*, August 14, 2019 (Presenter)
- **California's New Decanting Act**, *CalCPA, North County Inland Discussion Group*, July 24, 2019 (Guest Speaker)
- **The Difference Between a Trust and a Will**, *Real Talk San Diego*, May 10, 2017 (Guest Host)

AWARDS & HONORS

- Recognized by Best Lawyers in America® "Ones to Watch" (2022-2024)
- Super Lawyers® Rising Stars (2022)