



JULIE M. DEWBERRY

Julie Dewberry is a tax attorney licensed in both California and Virginia.

Ms. Dewberry advises domestic and international families, entrepreneurs, and executives on the tax-efficient accumulation, preservation, and transfer of assets. She excels at building an understanding of her client's values, concerns, and long-term goals and designing an estate plan to achieve those goals. Ms. Dewberry regularly prepares estate plans for clients who want to ensure their young children are cared for upon their deaths, as well as clients who need sophisticated wealth transfer tax planning. Ms. Dewberry also is adept 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.

Ms. Dewberry's success is predicated on her capacity to understand the unique challenges family businesses face, legal and otherwise. She has experience in the design, operation, and succession of family-owned businesses. Ms. Dewberry also represents nonprofit organizations, assisting them in formation qualification before the IRS and state agencies, and ongoing operations.

Active in legal, estate planning, and charitable communities, Ms. Dewberry is a member of the Korean American Bar Association of San Diego, the Trusts and Estates Section of the San Diego County Bar Association, North County Estate Planning Council, and the Rady Children's Hospital Foundation Estate and Trusts Council.

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

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

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SPEAKING ENGAGEMENTS

- **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)