



**JULIE M. DEWBERRY**

Julie Dewberry’s practice is focused on US and international estate and income tax planning, trust administration, charitable planning, and nonprofit organizations.

Julie advises successful families and individuals on the tax-efficient accumulation, preservation, and transfer of assets. She routinely prepares estate plans for clients who need sophisticated wealth transfer tax planning and business succession planning. Julie is skilled at mitigating interfamily disputes. She advises beneficiaries and fiduciaries in complex probate and trust administrations and resolves estate and gift tax audits.

Julie also advises clients in implementing charitable gifts and assists nonprofit organizations in formation, and ongoing operations. Her practice includes applications for federal and state tax-exempt status, retroactive reinstatement of tax-exempt status, grant making, the self-dealing rules, contracts, dissolutions, and compensation.

Julie is a regular speaker on the topics of estate, gift, and fiduciary income tax and presents with the Estate and Gift Tax Advisor of the U.S. Department of the Treasury on the same. Julie 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 Country Bar Association, and the North County Estate Planning Council.

Julie 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, Hartford College (2008)

**ADMITTED TO PRACTICE**

- ▶ California
- ▶ Virginia

## SPEAKING ENGAGEMENTS

- **Estate and Gift Tax Caselaw Updates including Connelly v. United States and Loper Bright Enterprises v. Raimondo**, *American Bar Association Tax Section Meeting*, September 26, 2024 (Presenter)
- **Tall Poppy Syndrome: Overcoming Being Cut Down**, *Lawyers Club of San Diego*, May 20, 2024 (Speaker)
- **Current Developments in Estate, Gift, and Fiduciary Income Tax Laws**, *American Bar Association Tax Section Meeting*, May 3, 2024 (Presenter)
- **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 (2021-2024)

## **AFFILIATIONS**

- State Bar of Virginia
- State Bar of California, Trusts & Estates Section and Taxation Section
- Rady's Children's Hospital Foundation Estates and Trusts
- San Diego Inn of Court (President 2009; Board of Directors, 2005-2015)
- 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
- Lawyers Club of San Diego