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

She focuses on tax and estate planning for U.S. and non-U.S. individuals, with a concentration on wealth management and succession structures for multi-national families.

Josie works closely with families in Latin America, providing guidance on cross-border tax planning, reporting and compliance. With an understanding of the tax regimes in various Latin American jurisdictions, and working closely with local advisors, she has helped clients navigate the complexities of these systems to establish compliant structures. Her experience in Latin America includes advising individuals on tax-efficient structures for investments in the U.S., often addressing FIRPTA implications applicable to U.S. real estate, and has vast experience advising on pre-immigration planning for family members considering a temporary or permanent move to the U.S.

Josie regularly works closely with U.S. and non-U.S. fiduciaries, advising on trust administration, structure reorganizations and U.S. tax and reporting issues, often facilitating the coordinating of tax and compliance advice across various jurisdictions. She has advised on a wide range of matters and tax issues, including the formation and administration of private trust companies (PTC), U.S. taxation and anti-deferral regimes applicable to trust structures and their beneficiaries, and information reporting.

Talks

- "What US and international taxpayers need to know about Biden's tax policy proposal (Green Book)," STEP Mexico presentation - July 28, 2021, co-speaker
- "[Trusts and Continental law: is this marriage possible?](#)," International Association of Young Lawyers - November 14-16, 2019 (Geneva), moderator
- "Private Client Taxation and Wealth Planning" Multi-module training program for Fideuram Intesa San Paolo Private Banking - February through May 2021, co-speaker

External publications

'Moves and Appointments,' Notes, July 2019, quoted

'Cuba: Fine to stormy,' Offshore Investment - July/August 2017, co-author

Admissions

State of New York, 2011

Education

Brooklyn Law School, J.D.

University of Central Florida, B.A.

Languages

English

Spanish

Memberships

New York City Bar Association

Association Internationale des Jeunes Avocats (International Association of Young Lawyers)

Society of Trust and Estate Practitioners

Key dates

Year joined: 2015

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