withersworldwide

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

She is a skilled estate and charitable tax attorney with a proven track record of guiding clients through complex wealth transitions with advice that is clear, creative and enduring. As a partner in the trust, estate and charities team at Withers Bergman LLP, she specializes in crafting tailored strategies that address a wide range of estate planning needs, from basic estate and incapacity planning to advanced techniques for minimizing tax burdens and preserving family legacies. Beyond her legal acumen, Elizabeth is known for her ability to build strong relationships with clients and provide personalized guidance. Her compassionate approach and keen understanding of complex legal matters make her a trusted advisor for individuals and families seeking to navigate the complexities of estate planning and charitable giving.

Elizabeth's expertise extends to philanthropy, where she assists individuals and organizations in establishing meaningful charitable foundations, structuring major and planned gifts, and navigating the complexities of charitable giving. She is particularly passionate about helping clients identify and develop philanthropic initiatives that align with their values and make a lasting impact. In addition to her work with individuals and families, Elizabeth provides comprehensive legal counsel to charitable organizations. She assists in structuring charitable organizations, ensuring compliance with regulatory requirements, and navigating the complexities of fundraising, donor relationships and gift structuring and administration. Her deep understanding of the legal landscape enables her to provide practical guidance and support to nonprofits of all sizes.

Elizabeth's commitment to excellence is reflected in her professional achievements. She is certified by the California Board of Legal Specialization as a legal specialist in Estate Planning, Trust and Probate Law and is a fellow of the American College of Trust and Estate Counsel (ACTEC). The Los Angeles Business Journal recognized her as a 2024 Nonprofit and Philanthropy Leader of Influence. She has also been recognized by Chambers High Net Worth Guide and The Legal 500 US for her expertise in Private Wealth Law and Not-for-Profit Tax.

Elizabeth's dedication to education is evident in her role as adjunct faculty at the UCLA School of Law, where she teaches Estate and Gift Tax, Estate Planning, and Wills & Trusts. She is also faculty of the American Institute for Philanthropic Studies Certified Specialist in Planned Giving program. By sharing her knowledge and experience with the next generation of legal and gift planning professionals, Elizabeth continues to drive innovation and excellence in the field.

Elizabeth serves on the board of the Heifer International Foundation, supporting the work of Heifer International to end hunger and poverty around the world by providing livestock and training to struggling communities.

Talks

- '*New Approaches to Philanthropy – Working with Business Owners to Achieve Impact*,' Fairbanks Estate Planning Council - November 11, 2024, speaker
- '*Beyond Donor-Advised Funds: Exploring Tax-Efficient Giving and Philanthropic Strategies*,' The National Association of Personal Financial Advisors (NAPFA) Spring 2024 National Conference - May 9, 2024, speaker
- '*Corporate Transparency Act Planning for Professional Advisors*,' Motion Picture Television Fund Professional Advisory Network - February 20, 2024, speaker
- '*Estate Planning with or for Cryptocurrency*,' Estate Counselors Forum - February 15, 2024, speaker
- '*The Corporate Transparency Act*,' Probate Attorneys of San Diego Webinar - February 13, 2024, speaker
- '*Corporate Transparency Act: Pulling Back the Curtain and Shining a Spotlight on Client Assets*,' California Lawyers Association Webinar - December 6, 2023, speaker
- '*Corporate Transparency Act: Pulling Back the Curtain & Shining a Spotlight on Client Assets*,' Beverly Hills Bar Association Trust & Estates Law Seminar - November 21, 2023, speaker
- *'Corporate Transparency Act - Pulling Back the Curtain and Shining a Spotlight on Client Assets*,' 44th Annual Inland Empire Estate Planning Seminar - November 1, 2023, speaker
- '*Corporate Transparency Act*,' California Lawyers Association Trust and Estates Section Trust Me! Podcast Season 3, Episode 10 - October 30, 2023, speaker
- *'The Global Rethinkers: Social impact and climate emergency,'* Withers video - April 27, 2023, speaker
- *'Estate Planning with 529 Education Savings Accounts,'* Fairbanks Estate Planning Council - March 20, 2023, speaker
- *'Is Your Gift Up for Grabs? Avoiding the Risk of Forfeiture Following the Breslin Case,'* Los Angeles Council of Charitable Gift Planners - March 16, 2023, speaker
- *'Women Forging Change - International Women's Day 2023,'* Heifer International Session - March 9, 2023, speaker
- *'Charitable Planning - Developments and Trends Affecting Forms 706 and 709,'* IRS Estate and Gift Attorneys Presentation - December 7, 2022, speaker
- *'Hot Topics: New Things for Seasonal Practitioners!,'* USC Trusts and Estates Conference - November 9, 2022, speaker
- *'The Art and Science of Gifts of Tangible Personal Property,'* Beverly Hills Bar Association - August 16, 2022, speaker
- *'"So, You Want to Give Us Your Picasso?" How to Recognize the Benefits and Pitfalls of Gifts of Art,'* Western Regional Planned Giving Conference - May 2022, speaker
- *'Estate Planning for Legacy,'* KPCC and LAist - May 18, 2022, speaker
- *'Expanding Hope: City of Hope Orange County Preview & 2022 Estate and Tax Planning Update,'* Legacy of Hope Society Webinar - March 16, 2021, speaker
- *'Creative ways to help clients with donor advised funds,'* Inland Empire Community Foundation's Professional Advisors Council Meeting - June 30, 2021, presenter

- *'Structuring Gifts to Achieve and Maximize Social Impact,'* Western Regional Planned Giving Conference - April 28, 2021, presenter
- '*Love in the Time of COVID-19: Trustee and Beneficiary Harmony in Years Like 2020*,' USC Gould School of Law 46th Annual Trust and Estate Conference - November 13, 2020, panelist
- '*Looking Ahead: Key benefits of Grantor Retained Annuity Trusts (GRATs)*,' Withersworldwide webinar - July 6, 2020, co-presenter
- *'Fundraising During the Coronavirus Pandemic,'* virtual panel at Western Regional Planned Giving Conference - June 25, 2020, panelist
- *'Introduction to estate planning,'* Jewish National Fund - May 14, 2020, speaker
- *'Are you feeling inSECURE? How to show you CARE in the age of COVID-19'* Inland Empire Community Foundation - May 5, 2020, speaker
- *'Are you feeling inSECURE? How to show you CARE in the age of COVID-19,'* San Gabriel Valley Bar Association - April 27, 2020, speaker
- *'Facilitating Philanthropy Using Charitable Gift Annuities and Donor Advised Funds,'* Motion Picture and Television Fund Event - August 29, 2019, speaker
- *'Lessons Learned from a Collective Century of Planned Giving Experience,'* Western Regional Planning Giving Conference - May 31, 2019, speaker
- *'Navigating the Twists and Turns of Testimentary Gift Annuities'* and *'Lessons Learned from a Collective Century of Planned Giving Experience,'* Western Regional Planning Giving Conference - May 31, 2019, speaker
- *'Probate: Everything You Need to Know,'* National Business Institute Seminar, Long Beach - December 13, 2018, presenter
- *'Foreign Trusts: What You Don't Know Can Hurt You,'* STEP San Diego - November 13, 2018, co-presenter
- *'Planned Giving when you're not a Planned Giving Officer,'* Association of Fundraising Professionals, Los Angeles Regional Philanthropy Conference - November 7, 2018, co-presenter
- *'Flexible Trust Structuring Across Generations,'* Financial Management for the Family Office Conference at Pepperdine - September 26, 2018
- *'Navigating the Trusts and Turns of Testamentary Gift Annuities,'* Los Angeles Council of Charitable Gift Planners - September 20, 2018
- *'Lessons Learned from a Collective Century of Planned Giving Experience,'* Western Regional Planned Giving Conference, Costa Mesa - June 1, 2018, presenter
- *'Flexible Trust Structuring Across Generations,'* AFOG meeting, Los Angeles - May 3, 2018
- *'Foreign Trusts: What You Don't Know Can Hurt You,'* ABA Section of Taxation 2018 Midyear Meeting, San Diego - February 10, 2018, co-presenter
- *'Charitable Giving Update,'* 2017 Western Conference on Tax Exempt Organizations, Los Angeles - December 01, 2017, speaker
- *'Foreign trusts: Classification, tax and reporting implications'*, STEP International Estate Planning Conference Wyoming - September 15, 2017, speaker
- 'California Fiduciary Taxation' with Alexander M. Popovich, California State Bar Association Taxation Section, May 12, 2016
- 'Moving to Paradise - What You Need to Know about Your Clients' Estate Plans When they Move from California to Hawaii' with Rhonda L. Griswold, University of Hawaii, April 29, 2016
- 'Fundamentals of Succession & Estate Planning' Paychex and Integrity Financial, April 27, 2016
- 'California: A Taxing Place for Trusts' with Alexander M. Popovich, USC Tax Institute, Los Angeles,CA, January 2016
- 'Relationships between Trustees and Beneficiaries: How to Avoid Conflicts' with Stephen C. Minana and Kenneth E. Petersen, Jr. 41st Annual USC Trust and Estate Conference, Los Angeles, CA, November 2015
- 'Opening the Door to Opportunity: How Charitable Gifts of Appreciated Real Estate Benefit Property Owners and the Charities they Support' Symposium hosted by Caltech, Huntington Hospital, Methodist Hospital and The Henry E. Huntington Library and Botanical Gardens, Pasadena, CA, November 2015

- 'When a Bequest Matures: Navigating the Process, Pitfalls and Best Practices for a Smooth Transition' Western Regional Planned Giving Conference, Costa Mesa, CA, May 2015
- 'Strategies and Contemporary Issues in Planning with Grantor Trusts' USC Tax Institute, Los Angeles, CA, January 2015
- 'Competing, Collaborating and Cultivating - Opportunities to Attract Gifts from Donors with Private Foundations' with Steven J. Chidester, Western Regional Planned Giving Conference, Costa Mesa, CA, May 2014
- 'Recent Developments in Charitable Planning' The Jerry A. Kasner Estate Planning Symposium, Santa Clara, CA, September 2013
- 'Professional Advisor and the Charitable Gift Annuity' Northwest Planned Giving Roundtable's 25th Conference, Portland, OR, September 2013
- 'The Opportunity of a Lifetime: Maximizing the Charitable Impact of a Liquidity Event' California Community Foundation, Los Angeles, CA, May 2012
- 'Fallow Ground or Fertile Soil? The unrealized potential of charitable real estate gifts' Glendale Estate Planning Council, Glendale, CA, February 2012
- 'Ask the Experts Panel: Advanced' Western Regional Planned Giving Conference, Costa Mesa, CA, June 2011

External publications

'*Leaders of Influence: Nonprofit & Philanthropy: Elizabeth Bawden*,' Los Angeles Business Journal - September 16, 2024, featured

'Important considerations when receiving an inheritance from a spouse,' Withers Insight - August 7, 2024, co-authored

'O.J. Simpson Never Paid the Goldmans the Millions He Owed Them. Can They Finally Collect?' Los Angeles Times - April 17, 2024, quoted

'States Want Tax Reform As Ohtani's Deal Deferrals Stir Controversy,' Front Office Sports - April 15, 2024, quoted

'*During the Strikes, Actors Got Financial Grants. Now It's Tax Season and Some Are Scrambling*,' The Hollywood Reporter - February 21, 2024, quoted

'Withers helps establish new $400m science institute at Caltech,' Withers Firm News - January 17, 2024, featured

'*New approaches to philanthropy – working with founders and entrepreneurs*,' Withers Video - January 17, 2024, featured

'Corporate Transparency Act: Is your privacy at stake?' Withers Video - December 14, 2023, featured

'*Patagonia 2.0: the founders who are reshaping philanthropy*,' Withers Insight - November 28, 2023, featured

'Should you write your own obituary?' Withers Insight - November 20, 2023, authored

'*Does your college student need estate planning?*' Withers Insight - August 2, 2023, co-authored

'Is your US estate plan up to date?' Withers Insight - July 5, 2023, co-authored

'*Are your charitable income tax deductions at risk?*' Withers Insight - May 19, 2023, authored

'*The Global Rethinkers: The Patagonia Effect: Philanthropy in Business*,' Withers Video - April 27, 2023, featured

'New reporting obligations for estate planning clients under the Corporate Transparency Act,' Withers Insight - April 26, 2023, authored

'*Plan On Having The Death Tax Live On*,' Forbes - April 19, 2023, quoted

'Is Forever Really Forever? Question May Be Answered in Lawsuit Over UC Hastings Name Change,' ABA Journal - October 13, 2022, quoted

'*Anne Heche's Son Seeks Control of Her Estate*,' WealthManagement.com - September 7, 2022, quoted

'*Part 3: Estate Planning with 529 Educational Savings Accounts*,' Withers Insight - August 24, 2022, authored

'*Part 2: Estate Planning with 529 Educational Savings Accounts*,' Withers Insight - August 24, 2022, authored

'*Part 1: Estate Planning with 529 Educational Savings Accounts*,' Withers Insight - August 11, 2022, authored

'*Ways Clients Can Help Their Children Buy a House*,' Withers Insight - June 21, 2022, authored

'Final Anti-Clawback Regs Give Estate Planners Green Light,' Tax Notes, November 26, 2019, quoted

'Preparing for Sunset - what every lawyer needs to know about the gift and estate tax,' Daily Journal's 'Wealth with Withers' column, June 25, 2019, authored

'Withers update on California and federal legislative activity affecting estate taxes,' Insight __ - June 19, 2019, co-authored

'*Navigating the twists and turns of testamentary gift annuities*,' Planned Giving Today, January 2019, authored

'Impact of tax reform on tax-exempt organizations paying compensation in excess of US $1 million,' Withers Insight - December 21, 2017, co-authored

'*Shoes for the Cobbler's Children: What Lawyers Need to Know About Estate Planning*', The Recorder, May 4, 2016, co-authored with Dina Y. Nam

'How Wealthy Individuals Can Strategically Gift Education,' Family Wealth Report, December 10, 2015 edition, co-authored with Dina Y. Nam

'Strategies and Contemporary Issues in Planning with Grantor Trusts,' __ 67-14 USC Law School Institutes On Major Tax Planning (2015), co-authored with Dina Y. Nam

'Accomplishing Clients' Estate Planning Goals in a Post-ATRA Environment in Best Practices for Structuring Trusts and Estates,' __ Aspatore Books, a Thomson Reuters business (2015 ed.)

'Planning for Non-Traditional Families, ' In Mittra, Sid, Sahu, Anandi, and Starn, Jr., Harry (Eds.), Practicing Financial Planning for Professionals, American Academic Publishing (11th ed., 2012)

Admissions

State of California, 2000

State of Arkansas, 2017

Education

UCLA School of Law, J.D.

Wheaton College (IL), cum laude, B.A.

Languages

English

Memberships

California Board of Legal Specialization Certified Legal Specialist in Estate Planning, Trust and Probate Law (2024-present)

American Institute for Philanthropic Studies Certified Specialist in Planned Giving program faculty (2019-present)
American College of Trust and Estate Counsel (ACTEC), Fellow (2014-present)

American College of Trust and Estate Counsel (ACTEC), Charitable Planning Committee

American College of Trust and Estate Counsel (ACTEC), Legal Education Committee, Co-Chair

USC Trust and Estate Conference Planning Committee, member

Los Angeles County Bar Association, Exempt Organization Section, Chair (2015-2016)

Ronald Reagan Presidential Foundation, Professional Advisory Council (2010-2015)

Beverly Hills Bar Association, Trusts and Estates Section, Chair (2009-2010)

Beverly Hills Bar Association, Executive Committee of Trusts and Estates Section (2005-2009)

Partnership for Philanthropic Planning of Greater Los Angeles, Past President (2007)

Western Regional Planned Giving Conference, Conference Chair (2005)

Key dates

Year joined: 2015
Year became partner: 2015

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