



## Helen Cheng

PARTNER | [SAN DIEGO](#) [SAN FRANCISCO](#)

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 [HELEN.CHENG@WITHERSWORLDWIDE.COM](mailto:HELEN.CHENG@WITHERSWORLDWIDE.COM)

 +1 619 564 6140

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SECRETARY JEFFREY FERRER

 [JEFFREY.FERRER@WITHERSWORLDWIDE.COM](mailto:JEFFREY.FERRER@WITHERSWORLDWIDE.COM)

 +1 858 400 1319



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### Helen is a partner in the private client and tax team.

She is a trusts and estates attorney who focuses on exempt organizations and international tax planning for inbound and outbound transactions. She assists clients in all aspects of estate planning, estate and trust administration and charitable planning.

Helen brings a diversity of experience to her clients. After graduating from Stanford Law School, she practiced international corporate tax law in China and California where she worked with multinational corporations, such as Oracle, Intel and Seagate, on sophisticated international tax planning techniques. Helen is also certified as a specialist in estate planning, trust, and probate law by the State Bar of California Board of Legal Specialization.

Previously, Helen worked at the San Diego Zoo to create its licensing and technology transfer program. She was directly responsible for the creation of the San Diego Zoo Global Centre for Bioinspiration and worked with companies such as Procter & Gamble, WD-40, Nike and Qualcomm to develop technologies inspired by nature.

Helen currently serves as chair of the Society of Trust and Estate Practitioners San Diego Branch (STEP SD) and on the STEP USA board of directors. She is also general counsel for the International Community Foundation and a board member at the Balboa Art Conservation Center. Helen is recognized as a Best Lawyers "One to Watch" for 2022, 2023 and 2024. She is also recognized as a recommended lawyer in The Legal 500 US 2024 guide in the area of Not-for-Profit Tax.

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### Talks

- '*International Charitable Planning*,' 16th Annual STEP International Tax and Estate Planning Forum - June 14, 2024, speaker
- '*Cross-Border Estate Administration*,' 16th Annual STEP International Tax and Estate Planning Forum - June 13, 2024, speaker
- '*So You Want to Give Away Your Business? Avoiding the Excess Business Holdings Rule*,' American Bar Association 36th Annual Real Property Trust and Estate Law Section (RPTE) National CLE Conference - May 9, 2024, speaker
- '*Nuts and Bolts of International Estate Planning - Part 2*,' STEP Los Angeles meeting - April 23, 2024, presenter
- '*Power Hour*,' 27th Annual Western Conference on Tax-Exempt Organizations - February 29, 2024, moderator
- '*International Trusts and Estates: Nuts and Bolts of Cross-Border Planning*,' STEP Los Angeles meeting - February 5, 2024, presenter
- '*Nuts and Bolts of Cross-Border Planning*,' ALI CLE International Trust and Estate Planning 2023 Webcast - June 29, 2023, co-presenter
- '*Matching Donor Personalities to their Perfect Gift*,' LACGP Western Regional Planned Giving Conference - May 18, 2023, co-presenter
- '*Decanting Trusts: Handling the Thorny Issues*,' American Law Institute CLE Webinar - February 15, 2023, presenter
- '*Charitable Planning*,' North County Estate Planning Council - December 6, 2022, co-presenter
- '*Tax Efficient Cross-Border Giving for US Persons*,' Informa Connect's Transatlantic Wealth and Estate Planning Conference - September 15, 2022, co-presenter
- '*Gifts of Complicated Assets*,' LACGP 2022 Western Regional Planned Giving Conference - May 26, 2022, co-presenter
- '*Decanting Trusts: What's New and How To Make It Work for Your Client*,' ALI CLE Program - January 13, 2022, co-presenter
- '*Wine Not? California's Decanting Act*,' ALI CLE Program - November 3, 2021, panelist
- '*Tax Efficient Cross-Border Giving by US Persons*,' Informa Connect's Transatlantic Wealth and Estate Planning Conference - September 15, 2022, co-presenter
- '*Wine Not? California's Decanting Act*,' Estate Planning and Trust Council of Long Beach - June 3, 2021, co-presenter
- '*An Introduction to International Estate Planning: Proper Planning to Protect Assets, and to Avoid Unnecessary Taxes and Disputes*,' Probate Attorneys of San Diego webinar - April 21, 2021, co-presenter
- '*Wine Not? California's New Decanting Act*,' San Luis Obispo County Bar Association webinar - February 24, 2021, co-presenter
- '*Powers of Appointment: Everything You Need to Know From the Planning and Litigation Perspectives*,' Orange County Bar Association, Trusts & Estates Section webinar - August 12, 2020, co-presenter
- '*International Estate and Gift Taxation*,' American Bar Association Real Property, Trust and Estate Law Section (ABA RPTE) webinar - September 17, 2019, co-presenter
- '*California's New Trust Decanting Laws*,' Long Beach Bar Association Probate, Trust & estate Planning Section - May 1, 2019, speaker
- '*Wine Not? California's New Decanting Act*,' First American Trust - January 28 and February 6, 2019
- '*Ethics Course: Cir. 230 Developments and Changes in Tax Practice Before the IRS*,' California Bar Association Annual Income Tax Seminar - June 2014
- '*The Rare and Wonderful World of...International Tax*,' California Society of Enrolled Agents, Palomar - May 2014
- '*FATCA, FBAR, Foreign Trusts... Oh My! US tax reporting traps for the unwary*,' California Society of Enrolled Agents, Palomar - August 2013

## External publications

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

'Considerations for making charitable gifts abroad,' Daily Journal's "Wealth with Withers" column - March 29, 2021, co-authored

'UBTI Proposed Regulations Answer Some Questions but Raise Others,' Tax Notes - July 13, 2020, co-authored

'New tax legislation establishes flat tax on investment income of private foundations,' Thomson Reuters' Taxnet Pro - January 30, 2020, co-authored

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

'Proposal to enhance implementation, enforcement of exit tax,' \_\_ Tax Notes - November 13, 2017, co-authored

'Consider the private operating foundation,' \_\_ Wealth Management's Trusts & Estates Magazine - October 2017, co-authored

## Admissions

State of California, 2000

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## Education

Stanford University Law School, J.D.

University of Kansas, B.A.

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## Languages

English

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## Memberships

ABA Section of Real Property and Trust & Estate Law, Legislative and Regulatory Issues Committee, Vice Chair

STEP San Diego, Branch Chair

STEP USA, Board of Directors

International Community Foundation, General Counsel

San Diego County Bar Association, Taxation Section, Member and Former Chair

Global Imprints, LLC, Advisory Council Member

State Bar of California, Member

Balboa Art Conservation Center, Former Board Member

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## Key dates

Year joined: 2015

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