withersworldwide

Lian Fang

PARTNER | NEW YORK

LIAN.FANG@WITHERSWORLDWIDE.COM

+1 212 848 9867

SECRETARY LISA JAIVEN

LISA.JAIVEN@WITHERSWORLDWIDE.COM

+1 646 428 8725

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

Lian's practice focuses on sophisticated tax and wealth planning matters for high net worth individuals and their families, both in a cross border context as well as in US domestic planning matters. She advises clients in the creation and administration of wealth planning structures that are tax efficient while reflecting long term goals in the protection and succession of wealth in multi-generational families. She also provides advice to individuals with various US connections, such as making gifts to US family members, preparing for migration to the United States, expatriation from the United States, investment in the United States or coming into compliance with US tax and reporting obligations.

Talks

- *'Cross-border issues with Greater China,'* STEP Silicon Valley webinar - June 2020, presenter
- *'Wealth Planning for Chinese Clients - Understanding Tax and Non-tax Issues in China,'* Hawaii Tax Institute - November 2019, presenter
- *'Challenges and Opportunities of Planning for Chinese Nationals,'* STEP New York - November 2018, presenter
- *'Trust, Asset Protection and Succession Planning for Chinese HNWIs,'* The 4th Investment Summit co-organized by Pinabase and Horizon Family Office (Omaha, Nebraska) - May 2017, presenter
- *'Tax Issues of Studying in the United States and Asset Protection,'* Morgan Stanley (New York), - October 2016, presenter

- *'US Tax and Succession Planning for Chinese Business Owners and Executives,'* US-China Council (New York) - April 2015, co-presenter
- *'Study in the United States - Tax Implications and Assets Protection,'* New York Private Bank and Trust (New York) - January 2015, presenter
- *'US Pre-Immigration Tax Planning,'* 5th Offshore Investment Conference (Shanghai) - June 2014, presenter
- *'Planning Opportunities in Asia,'* The 20th World Offshore Convention (New York) - November 2013, co-presenter
- *'Planning for US Family Members and Investments,'* UBS (Hong Kong) - September, 2013, co-presenter
- *'Moving to/Investing in the US: What You Need to Know,'* Bank of Singapore (Shanghai) - August 2013, presenter
- *'Planning for US Persons and Investments'* and *'Pre-Immigration US Tax Planning,'* Bank of Singapore (Beijing, Shanghai and Taipei) - March - May 2013, co-presenter
- *'Pre-Immigration Tax Planning,'* CITIC Bank (Hong Kong) - June 2012, presenter
- *'Investment in US Real Property by Non-US Persons - US Federal Tax Overview & Planning Techniques,'* Various banks and intermediaries (Withers Hong Kong) - October 2011, presenter
- *'U.S. Taxation of Foreign Persons - Some Useful Planning Tools,'* Cass Business School (London) - May 2011, presenter

External publications

'Tackling Tax Treaties - How double taxation agreements can reduce your tax liability,' China Economic Review - Summer 2012, co-author

'Winning at Monopoly - If you're planning to purchase a home in the UK or US think through the tax and estate-planning implications,' Finance Asia - November 2011, co-author

Admissions

China, 1997

State of New York, 2008

Education

Nanjing University, LL.B./LL.M.

Columbia University School of Law, LL.M./J.D. (James Kent Scholar)

Languages

English
Mandarin

Key dates

Year joined: 2011

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