



Julie Y. Wann Partner

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Julie is a member of the Corporate, Tax, and Estates & Trusts groups. Julie advises individuals in estate and tax planning, wealth transfer, and estate and trust administration. She represents limited liability companies, partnerships, corporations, and nonprofits, on entity formation, governance, and operational matters. Julie also focuses on individual, partnership, and corporate taxation, and structures real property transfers that preserve the real property tax basis.

Background

Prior to Hoge Fenton, Julie was a member of the Corporate, Tax, and Business Transactions Department at Hopkins & Carley, and was also a senior tax associate at Arthur Andersen LLP, where she specialized in international tax consulting and planning for multi-national corporations, including planning and implementing domestic and international corporate restructuring, mergers and acquisitions. Julie also performed corporate, partnership and individual income tax compliance and audited financial statements of partnership and corporations. Julie is a certified public accountant in inactive status.

Julie holds a *Juris Doctor* degree from the Santa Clara University School of Law, where she served as Technical Editor for the Santa Clara Law Review. She also holds a Master of Business Administration from the Santa Clara University Leavey School of Business and a B.S. Degree in Business Administration, with emphasis in accounting and finance, from the University of California at Berkeley.

Practice Areas

- Banking & Mortgage
- Corporate & Business Law
- Estates and Trusts
- Nonprofit Organizations
- Taxation

Languages

- Mandarin

Education

- J.D., Santa Clara University School of Law
- M.B.A., Santa Clara University Leavey School of Business
- B.S., Business Administration, with emphasis in Accounting and Finance, University of California at Berkeley.
- Certified Public Accountant (inactive)

Admissions

- California

Professional Activities

Julie's professional activities include membership in the Santa Clara County Bar Association and Kiwanis Club of San Jose. Julie was a Vice Chair of the California State Bar's Taxation Section Executive Committee for the 2009-2010 term and a Co-Chair of the Silicon Valley Chapter of the Young Tax Lawyers Committee of the California State Bar's Taxation Section. She also served as an editor of the California Tax Lawyer, a publication of the State Bar of California, Taxation Section.

Speaking Engagements

- Moderator, ***Let's Talk Mental Health***, Webinar, Hoge Fenton, May 11, 2022
- Speaker, *Defining Your Business Legacy*, Hoge Fenton, San Jose, CA, April 25, 2017