

HOGE ■ FENTON



JULIE Y. WANN

COUNSEL

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PRACTICE OVERVIEW

Julie Wann is a member of Hoge Fenton's Corporate, Tax, and Estates & Trusts groups. Julie focuses on individual, partnership, and corporate taxation, and the formation of limited liability companies, partnerships, corporations, and nonprofits. Julie advises individuals in estate planning, wealth transfer, and tax planning, and entities in sales, purchases, and restructurings. She also structures real property transfers that preserve the real property tax basis.

BACKGROUND

Prior to Hoge Fenton, Julie was in solo practice 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.

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, April 25, 2017

PRACTICE AREAS

Corporate & Business Law
Taxation
Estates and Trusts

LANGUAGES

Mandarin

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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