withersworldwide

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

She has a diverse and well-rounded tax background, including experience in both income tax and estate and gift tax matters, which makes her particularly suited for families with existing complex trust structures. She also has experience with cross-border families as well as nuances of visa designations and the interplay with tax laws. Interestingly, her own family is situated in three continents.

Naomita advises families with generational wealth in the context of changing circumstances and passage of time such as multi-generation wealth planning for family members who are beneficiaries of trusts settled by prior generations. This particular mix of experiences and knowledge enables Naomita to act as a proficient adviser for the globally mobile high net worth family. She also advises clients on tax, estate and succession planning related to cryptocurrencies and digital assets.

Talks

- '*State Income Tax and Trust Planning*,' 3rd Annual Nevada Bankers Association 2024 Nevada Trust Conference - April 30, 2024, speaker
- '*Leaving California*,' USC Gould School of Law 2024 Tax Institute - January 23, 2024, speaker
- '*Federal Estate, Gift, and GST Taxation Workshop*,' Hawaii Tax Institute 60th Annual In-Person Conference - November 5, 2023, speaker

- *'Federal Estate, Gift, and GST Taxation Workshop,'* The 43rd Annual Tax & Estate Planning Forum - October 20, 2023, speaker
- *'State Income Taxation and Trust Planning,'* The 43rd Annual Tax & Estate Planning Forum - October 20, 2023, speaker
- '*Advanced Estate Planning for Large Estates: Utilizing FLPs, Dynasty Trusts, SLATs, CRUTs/CRATs, Gift-Sale Transactions, and Non-Grantor Trusts,'* Strafford Webinars - October 12, 2023, speaker
- '*Generation Skipping Transfer Tax Review 2023*,' CalCPA Estate and Trust Planning Conference 2023 - July 14, 2023, speaker
- '*Advancing the Two Pillars: An OECD Tax Reform Project Update*,' Tax Notes Talk Podcast - November 30, 2022, speaker
- '*Federal Estate, Gift and GST Taxation Workshop*,' Hawaii Tax Institute 59th Annual In-Person Conference - November 6, 2022, speaker
- '*Tax Practice Speaker Series: Crypto and Cryo - Individual Taxation and Estate Planning for the Web 3.0 Era*,' Northwestern University Pritzker School of Law - October 21, 2022, speaker
- '*Qualified Small Business Stock*,' American Bar Association Tax Section's Virtual Fall Tax Meeting 2021 - September 23, 2021, panelist
- '*Trusts as Owners of a Closely Held Business Entity*,' American Bar Association Tax Section's Virtual Fall Tax Meeting 2021 - September 23, 2021, panelist
- '*Community Property: Impact on Marital Rights and Estate Planning*,' Minnesota CLE 2021 Probate & Trust Law Section Conference - June 8, 2021, speaker
- '*Potential Partnership Tax Pitfalls for Planners*,' 33rd Annual RPTE Virtual National CLE Conference - April 22, 2021, speaker
- '*1041s For Lawyers*,' RPTE Webinar, March 2021, speaker

External publications

'To Have and To Hold - Related Fiduciaries and Tax Issues,' (Tax) Matters of Life and Death Column, Tax Notes State - January 1, 2024, co-authored

'*Evolving Families in California: Why California life is worth the taxes - at least for many*,' Withers Insight - December 8, 2023, featured

'Sparing No One: Cross-Border Taxation of Globally Mobile Individuals - Part II,' (Tax) Matters of Life and Death Column, Tax Notes State - August 14, 2023, WealthBriefing - October 9, 2023, co-authored

'*Sparing No One: Cross-Border Taxation of Globally Mobile Individuals - Part I*,' (Tax) Matters of Life and Death Column, Tax Notes State - June 19, 2023, WealthBriefing - October 6, 2023, co-authored

'*How the Rich Put Millions Into Trusts To Take Care of Their Pets and Pay For Cryogenic Freezing After They Die*,' Business Insider - July 26, 2023, quoted

'To PTE or Not to PTE: Estate Planning and Salt PTE Elections,' (Tax) Matters of Life and Death Column, Tax Notes State - November 7, 2022, co-authored

'*Checking Out of Hotel California*,' (Tax) Matters of Life and Death Column, Tax Notes State - July 18, 2022, authored

'*Estate Administration of Cryptocurrencies*,' Tax Notes Federal - March 14, 2022, authored

'*Fall 2021 Issue*,' Michigan Alumnus - September 24, 2021, featured

'*Law360 features Naomita Yadav's move to Withers' trusts and estates team*,' Withers Insight - June 18, 2021, featured

'*Withers Adds Ex-EY Pro To Calif. Trusts And Estates Team*,' Law360 - June 17, 2021, quoted

'*On the Move: Tracking the Ins and Outs of California Lawyers*,' The Recorder - June 17, 2021, featured

'*The Daily Docket*,' Thomson Reuters Westlaw - June 16, 2021, featured

'*Wake Up Call: Recording Academy Seeks GC After Fee Criticism*,' Bloomberg Law June 16, 2021, featured

'*Withers continues growth of California private client practice with new partner Naomita Yadav*,' Withers Insight - June 14, 2021, quoted

'Carrying the Day with Carried Interest Wealth Transfer Planning for Fund Principals,' NYS Society of CPAs Tax Stringer - December 1, 2019, co-authored

'California End of Life Option Act,' California Lawyers Association's Trusts & Estates Quarterly 2018, Volume 24, Issue 1 - co-authored

'Digital Currencies and Reporting Requirements With Respect to Foreign Financial Assets,' Digital Currency Perspectives - February 9, 2015, co-authored

'Indian Safe Harbour Rules - Not So Safe?' Taxmann Journal - November 2013, co-authored

'India Seeks to Tax Transactions Involving Indian Assets,' Daily Journal - April 2013, co-authored

'IRS Allows Section 338(g) Election When Foreign Securities Compliance Decreased Ownership Below 80%,' Baker & McKenzie Newsletter - June 2012, authored

'IRS issues final regulations for cost sharing arrangements,' Baker & McKenzie Newsletter - February 2012, co-authored

Admissions

California - 2011

Education

Yale University, cum laude, B.S.

University of Michigan, M.B.A.

University of Michigan Law School, cum laude, J.D.

Languages

English

Key dates

Year joined: 2021

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