



# ESTATE PLANNING FOR NRA

THURSDAY, JULY 10TH 2025

Program: 1:00PM – 2:00PM

Nonresident aliens face unique challenges in U.S. wealth transfer planning, particularly regarding the absence of a unified gift and estate tax exemption. Without proper structuring, NRA clients may incur up to 40% combined transfer taxes on U.S.-situs assets – including real property, tangible assets, and certain financial holdings.

This webinar will provide practical, technical solutions to minimize these exposures while ensuring compliant succession planning.

ORANGE COUNTY BAR ASSOCIATION  
TAX LAW SECTION  
JULY MEETING: LIVE WEBINAR

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**SPEAKER:**

**CYNTHIA WU**

MANAGING ATTORNEY, CONCORD &  
WISDOM, APC.

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**APPROVED FOR 1.0  
MCLE CREDIT**

OCBA Tax Law Section Members: \$0
OCBA Attorney Member (Non-Section): \$25
Non-OCBA Member (Attorney): \$35

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## OCBA TAX LAW SECTION MEETING – JULY 10TH, 2025

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**Register online, fax or mail | Mail to: OCBA, P.O. Box 6130 Newport Beach, CA 92658 | Fax to: 949-440-6710**

If you are registering by fax or mail within 3 days of the meeting, please contact the OCBA at [education@ocbar.org](mailto:education@ocbar.org) to ensure registration.