

Cloris He

Senior Tax Consultant

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Languages spoken

Chinese (Mandarin) | English



About Cloris

Cloris He is a senior tax consultant in our Beijing office. She has over 10 years' experience in tax and private wealth services.

Cloris has extensive experience in advising high-net-worth individuals and families with US connections on US tax planning and integrated wealth succession strategies. She assists clients with trust establishment (including offshore trusts, Chinese trusts and US trusts), pre-US immigration and expatriation tax planning, and US investment structures. Cloris also has experience advising corporate entities and trustees in relation to the establishment of employee benefit trusts.

Before joining the firm, Cloris worked at a leading trust company in mainland China and an international accounting firm in the US.

Experience

- Assisted multiple high-net-worth clients in establishing foreign grantor trusts (FGTs) for their US family members.
- Assisted multiple founders of pre-initial public offering (IPO) Chinese companies in establishing offshore trust structures, effectively coordinating US tax, Chinese tax, foreign exchange control policies (e.g. Circular 37) and capital market regulatory requirements to achieve compliance and tax efficiency across multiple jurisdictions.
- Assisted pre-IPO companies in setting up employee incentive trusts for US employees.
- Assisted multiple trust companies in mainland China in localising FGTs, balancing compliance with both Chinese law and US tax requirements to satisfy the wealth succession needs of US-related families in China.
- Assisted multiple mainland Chinese clients with tax residency analysis under the US-China income tax treaty.
- Assisted clients in establishing family trust for Australian family members.

Credentials

Education

- Fordham University, M.S., Taxation, 2015
- Fordham University, M.B.A., Public Accountancy, 2015
- Sun Yat-Sen University, B.A., Accounting, 2012

Expertise

Services

- Tax Strategy & Benefits

About our firm

One of the world's strongest integrated law firms, providing insight at the point where law, business and government meet. We deliver commercially focused business solutions by combining our legal, lobbying and political capabilities and invaluable connections on the ground to a diverse mix of clients, from long-established leading corporations to emerging businesses, startup visionaries and sovereign nations. More than 1,500 lawyers in over 40 offices across four continents provide unrivaled access to expertise.