



Marc M. Stern

Partner

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Marc's practice focuses on representing individuals in connection with the retention and disposition of their wealth, including estate planning, transfer tax planning and premarital agreements, and in connection with obtaining benefits left to them by others, including estate and trust administration and probate litigation.

Professional Affiliations

- Coach AYSO, Beverly Hills Little League and Los Angeles Parks recreation basketball
- Member, Beverly Hills Estate Planning Counsel

Awards

- Chambers High Net Worth Guide, Leading Lawyer in Private Wealth Disputes, 2019
- Trust & Estate Trailblazers, *National Law Journal*, 2017
- *The Best Lawyers in America*®, 2010–2024
- *Southern California Super Lawyers*, 2010–2024
- Rated "AV Preeminent 5.0 out of 5," Martindale Hubbell

Bar Admissions

- California

Education

- University of Southern California Gould School of Law (J.D., 1986)
- Stanford University (B.S., 1981)
 - Mathematics

Estate Planning Experience

- Represented numerous estates and trusts in the orderly administration and distribution of their assets
- Successfully defended several Trustees who have been alleged to have failed to follow the terms of the trusts that they were administering
- Successfully represented beneficiary against Trustee who had committed multiple breaches of trust and obtained \$1 million judgment against Trustee
- Obtained \$500,000 settlement for daughter who had received nothing from mother's estate due to step-father's undue influence over mother
- Obtained numerous favorable valuation settlements, including discounts for lack of control and marketability, with Internal Revenue Service in connection with estate and gift tax return audits
- Established investment vehicles for families to diversify investments and centralize management
- Advised clients regarding economics and advisability of various sophisticated transfer tax plans, such as Qualified Personal Residence Trusts, Grantor Retained Annuity Trusts, Charitable Remainder Trusts, Charitable Lead Trusts, Private Annuity Trusts and other Irrevocable Trusts, and assisted clients in implementing plans
- Successfully negotiated more than 120 premarital agreements

Insights

January 10, 2024

31 Greenberg Glusker Attorneys Selected to 2024 Southern California Super Lawyers
Super Lawyers

November 28, 2023

Marc M. Stern Featured in MarketWatch's Moneyist Discussing Inherited Home Ownership
MarketWatch

August 17, 2023

52 Greenberg Glusker Attorneys Named to 2024 Best Lawyers® and Ones to Watch® Lists

July 28, 2023

A Feud is Brewing Over Dianne Feinstein's Husband's Estate
WealthManagement.com

January 10, 2023

35 Greenberg Glusker Attorneys Selected to 2023 Southern California Super Lawyers
Super Lawyers

November 15, 2022

Aaron Carter's Death Renews Focus on Mismanagement of Funds

WealthManagement.com

October 5, 2022

The move that protects everyday millionaires from the estate tax hit in 2026

Accounting Today

August 18, 2022

38 Greenberg Glusker Attorneys Named to 2023 Best Lawyers® List

June 29, 2022

Chadwick Boseman's Estate Reaches Amicable Agreement

WealthManagement.com

January 20, 2022

26 Greenberg Glusker Attorneys Selected to 2022 Southern California Super Lawyers

Super Lawyers

December 10, 2021

IRS Announces 2022 Inflation Adjusted Amounts For Transfer Taxes

Greenberg Glusker Client Alert

August 19, 2021

37 Greenberg Glusker Attorneys Named to 2022 Best Lawyers® List

March 26, 2021

U.S. Senate Introduces Legislation for Higher Taxes on Wealth

March 19, 2021

IRS and California Franchise Tax Board Extend Deadlines for Individual Taxpayers to May 17, 2021 - What You Need to Know

January 21, 2021

26 Greenberg Glusker Attorneys Selected to 2021 Southern California Super Lawyers

Super Lawyers

November 23, 2020

California Tax Boon Granted By Voters Sees Rush Of Pre-Deadline Interest

Bisnow

November 13, 2020

Proposition 19 Set to Limit Ability to Transfer California Real Property Between Parents and Children Without Property Tax Reassessment

August 20, 2020

36 Greenberg Glusker Attorneys Named to 2021 Best Lawyers® List

August 17, 2020

Does the Golden State Want Your Gold? California Legislature Resumes Discussions Of New Annual Wealth Tax

April 10, 2020

Important Tax Updates – COVID-19 Edition

April 10, 2020

IRS Issues Notice Providing for the Delay of Federal Tax Filings and Federal Tax Payments

January 15, 2020

23 Greenberg Glusker Attorneys Selected to 2020 Southern California Super Lawyers

August 15, 2019

29 Greenberg Glusker LLP Lawyers Named to 2020 Best Lawyers® List

July 12, 2019

Greenberg Glusker's Private Client Services Group Recognized in Chambers and Partners 2019 High Net Worth Guide

Chambers and Partners

March 29, 2019

Bill Proposed In California Legislature Would Tax Transfer Of Wealth Over \$3.5 Million

Greenberg Glusker Client Alert

January 31, 2019

24 Greenberg Glusker Attorneys Selected to 2019 Southern California Super Lawyers

August 15, 2018

26 Greenberg Glusker attorneys named to 2019 Best Lawyers® list

July 24, 2018

UTA Signs Ray Bradbury Estate (Exclusive)

The Hollywood Reporter

December 20, 2017

Doubling Down: Gift, Estate and GST Tax Changes Under the Tax Cut and Jobs Act

Greenberg Glusker Client Alert

August 15, 2017

21 Greenberg Glusker Fields Claman & Machtinger LLP attorneys named to 2018 Best Lawyers® list
Best Lawyers

January 11, 2017

Simplified tax regime under Trump might obviate current workarounds, experts say

Los Angeles Daily Journal

September 2, 2016

Transfers of Family-Controlled Business Entities to Family Members Could Get More Expensive

Greenberg Glusker Client Alert

January 22, 2016

23 Greenberg Glusker Attorneys Named to Super Lawyers 2016

Super Lawyers

January 6, 2015

Berzack Investment Property Advisors to Host Annual Multifamily Wealth Seminar for Investors

Multifamily Biz

August 12, 2014

Sterling Family Trust Completes \$2 Billion Sale of Los Angeles Clippers to Steve Ballmer

Greenberg Glusker Press Release

July 28, 2014

Judge Approves \$2 Billion Sale of Los Angeles Clippers; Allows Sale to be Completed Regardless of Appeal

Business Wire

June 3, 2014

Quartet of firms handles \$2 Billion LA Clippers sale to former Microsoft CEO

Los Angeles Daily Journal