



## 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*