Greenberg Glusker

Stefanie J. Lipson

Partner

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Stefanie J. Lipson's practice focuses on providing families with counsel in all aspects of their personal legacy planning, including operation and succession planning for family owned businesses, tax efficient long term wealth transfer solutions, and funding and ongoing administration of family foundations.

Stefanie specializes in providing tax counsel for multi-generational family owned businesses, real estate entrepreneurs and high profile entertainment industry figures. Her close relationships with her clients and her understanding of their businesses and wealth structure allow her to employ a holistic approach to addressing a client's long term planning needs. Working together with the family's team of advisors, including family office general counsel, outside business managers, accountants and wealth management advisors, and using her specialized tax background, Stefanie provides counsel to the senior generation by crafting responsible and tax efficient strategies to meet the family's wealth transfer and charitable goals while addressing family governance and business management concerns that arise in the wealth transition process.

Stefanie's unique approach engages multiple generations of the family from the early stages of the planning process by assisting in educating the younger generations on the privileges and responsibilities of wealth transfer, while working with this generation to understand the importance of adopting long term planning strategies early for the next generation.

Whether planning for a significant liquidity event or assisting in the transition of family business equity and management interests, Stefanie works with each generation of the family to address the "What's Next" question.

Recognizing the difficulties and emotional hardship the death of a loved one can cause, Stefanie's assistance to families through the post-death administration process provides families with continuity of counsel during a sensitive time, helping surviving spouses, children, siblings and grandchildren navigate the complications of wealth transition and asset division while carrying out their loved ones' wishes.

Stefanie has been recognized in *Chambers' High Net Worth Guide* in the area of Private Wealth Law in 2020 and 2021, featured in *The Best Lawyers in America* since 2021, and recognized in *Super Lawyers' Southern California Rising Stars* list.

Professional Affiliations

- Member, The Society of Trust and Estate Practitioners (STEP) - Los Angeles

Awards

- Recognized in *Chambers' High Net Worth Guide* in the area of Private Wealth Law, 2020 & 2021
- *The Best Lawyers in America*, Trusts and Estates, 2021-2023
- *Super Lawyers* Southern California Rising Stars, 2009-2021

Bar Admissions

- California

Education

- New York University (LL.M.)
    - Taxation (Executive Program)
- University of Southern California Gould School of Law (J.D.)
- University of California, Los Angeles (B.A., *magna cum laude*)
    - Phi Beta Kappa, History Major

Insights

March 2, 2023
Lessons from Michael Jordan's $10M Make-A-Wish Donation
WealthManagement.com

August 18, 2022
38 Greenberg Glusker Attorneys Named to 2023 Best Lawyers® List

August 19, 2021
37 Greenberg Glusker Attorneys Named to 2022 Best Lawyers® List

July 22, 2021
Three Greenberg Glusker Partners Recognized in Chambers High Net Worth Guide for 2021
Chambers and Partners

June 8, 2021
11 Greenberg Glusker Attorneys Selected to Super Lawyers Southern California Rising Stars
Super Lawyers

June 7, 2021
Wealth Management & Estate Planning Roundtable
Los Angeles Times

March 26, 2021
U.S. Senate Introduces Legislation for Higher Taxes on Wealth

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

July 9, 2020
Two Greenberg Glusker Partners Recognized in Chambers High Net Worth Guide for 2020

June 9, 2020
12 Greenberg Glusker Attorneys Selected for Super Lawyers Rising Stars

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

June 6, 2019
12 Greenberg Glusker Attorneys Selected for Super Lawyers Rising Stars

March 29, 2019
Bill Proposed In California Legislature Would Tax Transfer Of Wealth Over $3.5 Million
Greenberg Glusker Client Alert

June 7, 2018
14 Greenberg Glusker Attorneys Named Super Lawyers Rising Stars

December 20, 2017
Doubling Down: Gift, Estate and GST Tax Changes Under the Tax Cut and Jobs Act
Greenberg Glusker Client Alert

October 31, 2016
Happy Birthday to the Estate Tax
Accounting Today

September 2, 2016
Transfers of Family-Controlled Business Entities to Family Members Could Get More Expensive
Greenberg Glusker Client Alert

May 12, 2016
What Return Preparers Should Know About the Deceptively Simple IRS Form 8971
Bloomberg BNA

January 20, 2016
New California Laws for 2016 - AB 139: Allowing revocable TOD deeds
Los Angeles Daily Journal

October 15, 2015
Highway Bill Paves New Road to Estate Tax Compliance
Bloomberg BNA

September 16, 2015
Surface Transportation Act Paves New Road to Estate Tax Reporting Compliance
Bloomberg BNA

May 20, 2015
Trusts' Material Participation: Useful Guidance From ABA
Law 360

March 2, 2015
So You Want to Join the Big Leagues?
Sports Litigation Alert

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

April 15, 2014
Trustable guidance on material participation?
Los Angeles Daily Journal

October, 2013
Proactive Strategies for Mitigating the Medicare Surtax
Journal of Financial Planning

June, 2013
The Business Skills Trust: Helping Younger Generations To Take A Leadership Role In The Family Business
Smart Business

April 26, 2013
Stay healthy with new Medicare taxes
Los Angeles Daily Journal

February, 2012
Entering the 'legal twilight zone': a lesson in trust law
Los Angeles Daily Journal

October 1, 2011
Bet Tzedek Names Greenberg Glusker 2011 Pro Bono Firm of the Year
Greenberg Glusker Press Release- Bet Tzedek

February 28, 2011
Death, Taxes and the Oscars
The Recorder

2010
Trust Governing Law Clauses: Issues the Estate Planning Lawyer Should Consider In Drafting Governing Law Clauses

June 15, 2009
Thirteen Greenberg Glusker Attorneys Recognized As Rising Stars
Super Lawyers

Table | Talk Events

Welcome to Table Talk!

Over the last year, we have all spent more time at home than we planned. One of the highlights of the time at home has been the conversations that happen around gatherings in the kitchen. Our monthly series, Table Talk, brings these conversations to you in your home or office on a variety of estate planning topics.

Sit down with us at our virtual table during our scheduled monthly talks, which can be found here, or gather a small group of guests and contact us to schedule a private Table Talk on one of the below topics.

- Alphabet Soup: Just the Right Mix of GRATs, QPRTs, CLATs (and All Those Other Acronym Trusts)
- From Low Simmer to Rapid Boil — Anticipating and Managing Beneficiary Challenges
- Taking Stock and Making Gravy – Planning with S Corp Stock (And Other Closely Held Entities)
- The Secret's in the Trust: Using Privacy Trusts and Other Structures to Protect Beneficiaries
- Adding Some Spice – How International Ties Flavor Your Planning
- Sugar and Spice, Maybe a Little Too Nice – Gifts to Caregivers, Unexpected Companions and Other Issues of Undue Influence
- Making Lemonade from Lemons: Planning Mistakes and the Opportunities that Can Arise from Them
- Stirring the Gift Pot – Why Gifting Equally Is Not Always Fair, and Gifting Fairly Is Not Always Equal
- A Good Vintage Goes a Long Way – Opening Up a Trust with Decanting
- A Must Have Ingredient in Every Kitchen– Understanding and Using Grantor Trusts
- Making the Cake and Eating It Too - When Tasting the Benefits of Your Own Planning Ruins the Dish
- Don't Spoil Their Appetite- How to Give Thoughtfully to Your Kids
- From Plastic Fork to Silver Spoon - Understanding the Tax Benefits of Planning Early
- 2 Cups + 2 Tbsp, Divided - Planning After Divorce or a New Marriage

- If You Can't Stand the Heat... Tax Planning in an Election Year

We look forward to welcoming you at our table.