



Stefanie J. Lipson

Partner

SLipson@ggfirm.com

Ph. 310-785-6840

Fax 310-201-2332

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 by Southern California's Super Lawyers as a Rising Star each year since 2009.

Awards

- Southern California Super Lawyers Rising Stars, 2009-2019

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

Media

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 1, 2013

Proactive Strategies for Mitigating the Medicare Surtax

Journal of Financial Planning

June 3, 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

December 17, 2012

Three French Hens, Two Turtle Doves, and Money for My Tax Lien

Law Law Land

February 1, 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

January 1, 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