



Stefanie J. Lipson

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Stefanie J. Lipson is a partner in the Private Client Services group at Greenberg Glusker, where she leads the Family Office Advisory practice.

Stefanie provides comprehensive counsel to domestic and international families, family offices, real estate and tech entrepreneurs, high-profile entertainment figures, private investors, and closely held business owners and founders in all aspects of personal wealth, tax, estate and succession planning.

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, 2021-2025
- *Super Lawyers* Southern California Rising Stars, 2009-2022

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*)

Insights

April 30, 2025

S Corp Files—The Case To Find A Post-Death Inside Basis Step Up

Bloomberg Tax

April 15, 2025

Out with a Whimper: FinCEN Issues Interim Final Rule on Corporate Transparency Act, Narrows BOI Reporting Requirements

March 4, 2025

Corporate Transparency Act Back in Effect: Updated BOI Compliance Deadlines

December 6, 2024

Nationwide Injunction Halts Enforcement of the Corporate Transparency Act

October 7, 2024

From The Boardroom To The Living Room

Los Angeles Business Journal

September 16, 2024

Corporate Transparency Act: Reporting Deadline Approaching

August 15, 2024

46 Greenberg Glusker Attorneys Named to 2025 Best Lawyers® and Ones to Watch® Lists

July 16, 2024

Beyond the GST of It

Trusts & Estates Magazine & WealthManagement.com

February 5, 2024

The Corporate Transparency Act - Summary of Entity Reporting Obligations

December 27, 2023

Corporate Transparency Act: Action Plan for Upcoming Reporting Requirements

December 13, 2023

The Unexpected Half-Life of A Terminating Grantor Trust or QSST

Trusts & Estates

October 2, 2023

Top Tax and Legal Considerations for Wealthy Families Going Global

Los Angeles Business Journal

August 17, 2023

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

July 20, 2023

Navigating International Legal Considerations for Advisors Serving Multi-National Families

WealthManagement.com

March 2, 2023

Lessons from Michael Jordan's \$10M Make-A-Wish Donation

WealthManagement.com

August 18, 2022

32 Greenberg Glusker Attorneys Named to 2023 Best Lawyers® List

August 19, 2021

29 Greenberg Glusker Attorneys Named to 2022 Best Lawyers® List

July 22, 2021

Two 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

28 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

Events

June 9, 2025

A Battle With The U.K. Bare Trust—Let's Settle This Once And For All!
Online

June 5-6, 2025

IMN Real Estate Family Office & Private Wealth West Forum
Monarch Beach Resort, Dana Point, CA

May 16, 2025

Case study: succession challenges in a new era
Hamilton Princess Hotel & Beach Club, Bermuda

February 11, 2025

Top 10 Planning Strategies in the Rush to Plan in 2025
Panevino | Las Vegas, NV

January 29, 2025

Elections, Instability and Taxation
Sheraton Grand Los Angeles

November 7, 2024

Fools Rush In | 61st Annual Hawaii Tax Institute
Sheraton Waikiki Resort, Honolulu, Hawaii

November 6, 2024

Creating a True Comprehensive Plan – The Danger of Excessive Focus on Estate Tax Savings Planning | 61st Annual Hawaii Tax Institute
Sheraton Waikiki Resort, Honolulu, Hawaii

October 6, 2024

STEP Canada-USA 2024 Cross-Border Conference
Chicago Marriott Downtown Magnificent Mile

September 19, 2024

ACG 101 Family Office Wealth Conference

Sheraton Universal Hotel

June 13, 2024

The 16th Annual STEP International Tax and Estate Planning Forum

Surf & Sand Resort, Laguna Beach, CA

May 8, 2024

Ivyfon Los Angeles Family Office Outlook Forum 2024

Los Angeles, California & Virtual

April 24, 2024

Wealth Wednesday: I Think I Get the GST of It! | CalCPA

March 4, 2024

International Bar Association | 29th Annual International Private Client Tax Conference

Raffles London

January 24, 2024

Did You Get The GST Of It? A Deeper Look Into GST Trusts And When The Automatic Allocation Of GST Exemption Will Apply | USC Tax Institute

Sheraton Grand Los Angeles

January 22, 2024

USC Gould School of Law 2024 Tax Institute

Sheraton Grand Los Angeles

May 4, 2023

STEP International Trust and Estate Planning Forum

Surf & Sand Resort

April 18, 2023

Working with International Clients: You Don't Always Get to Choose Your Own Adventure | Beverly Hills Bar Association

Webinar

January 29, 2021

Adding Some Spice: How International Ties Flavor Estate and Gift Tax Planning

Virtual

January 27, 2020

USC 2020 Tax Institute

Millennium Biltmore Hotel Los Angeles

November 4, 2019

Hawaii Tax Institute

Sheraton Waikiki Resort

June 20, 2019

Los Angeles Business Journal | Women's Council & Awards

J.W. Marriott L.A. Live

June 20, 2018

Planning Opportunities for Individuals

Skirball Cultural Center

January 23, 2017

Consistent Basis or Completely Baseless

USC Gould School of Law Tax Institute

April 1, 2009

An Estate Planning Expedition: What To Do Now and What To Know To Be Successful Later

Table | Talk Events



Welcome to Table Talk!

Some of the most thoughtful and engaging conversations happen around the kitchen table—where ideas are shared, questions are asked, and stories unfold. Inspired by these meaningful moments, our Table Talk series brings that same spirit of connection to you in your home or office through discussions on a variety of estate planning topics.

Sit down with us at our virtual table by gathering a small group of guests and [contacting us](#) to schedule a private Table Talk on one of the topics listed below.

- 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.