

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, 2026
- Trust & Estate Trailblazers, *National Law Journal*, 2017
- *The Best Lawyers in America*®, 2010–2027
- *Southern California Super Lawyers*, 2010–2026
- 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

Services

- Private Client Services
- Trusts & Estates Planning
- Charities & Nonprofit Organizations
- High Net Worth Families
- Sports
- Trusts & Estates Administration
- Tax
- High Net Worth & Probate Litigation

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