Stefanie J. Lipson

Co-Chair, Private Client Services

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Stefanie J. Lipson is Co-Chair of the Private Client Services group at Greenberg Glusker and leads its Family Office Advisory practice.

Stefanie advises domestic and multinational families, family offices, entrepreneurs, closely held business owners and founders, high-profile entertainment professionals, and real estate families on tax, estate, succession, privacy, and cross-border planning considerations relating to their personal wealth, family, and business matters.

Her practice includes advising senior-generation and next-generation family members on wealth transfer planning in connection with liquidity events, significant acquisitions, and ownership transitions; privacy-sensitive ownership structures; planning for families with significant California real estate portfolios and closely held business interests; the intersection of estate and trust matters with family law; California tax, residency, trust, and property tax issues; and cross-border residency, succession, and transfer tax planning considerations, particularly in matters involving U.S.-UK connected individuals and families.

Stefanie is a Fellow of the American College of Trust and Estate Counsel (ACTEC) and a full member (TEP) of the Society of Trust and Estate Practitioners (STEP). She is a frequent author and speaker on domestic and cross-border tax and wealth transfer planning topics and is recognized in *Chambers High Net Worth Guide* in the area of Private Wealth Law, *Legal 500* (US Elite Los Angeles – Tax), the Private Client Global Elite Directory, and *The Best Lawyers in America*®.

Professional Affiliations

- Fellow, American College of Trust and Estate Counsel (ACTEC)
- Member, The Society of Trust and Estate Practitioners (STEP) - Los Angeles
- Member, Trusted Advisor

Services

- Private Client Services
- Family Office Advisory
- High Net Worth Families
- Charities & Nonprofit Organizations
- Opportunity Zones
- Tax
- Trusts & Estates Administration
- Trusts & Estates Planning
- International Private Wealth Law

- Member, Beverly Hills Estate Planning Council
- Member, Family Firm Institute

Awards

- Recognized in *Chambers' High Net Worth Guide* in the area of Private Wealth Law, 2020, 2021, 2025, 2026
- *Legal 500*, US Elite Los Angeles - Tax, 2026
- *ALM*, Private Client Global Elite Directory, 2026
- *Lawdragon*, 100 Leading Global Wealth Lawyers, 2026
- *The Best Lawyers in America®*, Trusts and Estates, 2021-2027
- *Daily Journal,* Top Estate & Wealth Management Attorneys, 2025, 2026
- *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*)

Publications

August 14, 2026
Where family offices win in direct acquisitions of private U.S. "middle-market" companies
Wealth DFM Magazine

October 9, 2025
How Much To Say and When: A Growing Contradiction for Trustees and Advisors in United States Nextgen Trust Planning
ThoughtLeaders4 High Net Worth Litigation, Advisory & Divorce Magazine

October 6, 2025
Avoid Generalizations In Working With NextGens
Los Angeles Business Journal

July 18, 2025
Competitive Advantages For Family Offices In Direct Acquisitions of Private Companies
Trust & Estates Magazine

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

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

Events

June 11, 2026
Gen Z and the Future of Wealth: What HNW Advisers Need to Know | Private Client

Advisory and Litigation Forum: Paris

June 10 - June 12, 2026
Private Client Advisory and Litigation Forum: Paris | ThoughtLeaders4

June 2, 2026
UK Bare Trust | STEP Los Angeles International Tax & Estate Planning Forum

June 1 - June 2, 2026
The 18th Annual STEP Los Angeles International Tax & Estate Planning Forum: Solving International Challenges

May 20, 2026
Planning With, and The Pitfalls of SLATs, A Cautionary Tale of Two Trusts

May 5, 2026
A Multijurisdictional Planning Adventure: Navigating Cross-Border Transfer Tax and Trust Planning | 2026 Nevada Tax and Trust Conference

April 14, 2026
Women of ACG Spring Luncheon

April 10, 2026
Sunrise, Sunset: East Coast and West Coast Perspectives on Premarital Agreements, Estate Planning, Divorce, and Death

March 18, 2026
Beyond The GST Of It! A Deeper Look at the GST Tax and Use of GST Exemption | Marin County Bar Association

March 1, 2026
International Bar Association | 31st Annual International Private Client Tax Conference

February 5, 2026
Unique Legal Landscapes For Acquiring and Managing High Profile Households & Estates

January 28, 2026
A Battle With The U.K. Bare Trust – Let's Settle This Once And For All!

January 15, 2026
The Day That Duty Died | Heckerling Institute on Estate Planning

November 25, 2025
Responsible wealth stewardship: Successful strategies in practice | STEP Global

Webinar

November 5, 2025
Working with International Clients: You Don't Always Get to Choose Your Own Adventure | 62nd Annual Hawaii Tax Institute

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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.