
Stefanie J. Lipson

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Stefanie J. Lipson is Co-Chair of the Private Client Services Group at Greenberg Glusker and leads their 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 is a Fellow of the American College of Trust and Estate Counsel (ACTEC), is a full member (TEP) of the Society of Trust and Estate Practitioners, and is recognized in *Chambers' High Net Worth Guide* in the area of Private Wealth Law and featured in *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, Beverly Hills Estate Planning Council
- Member, Family Firm Institute
- Member, International Tax Planning Association

Awards

- Recognized in *Chambers' High Net Worth Guide* in the area of Private Wealth Law, 2020, 2021, 2025
- *Legal 500*, US Elite Los Angeles - Tax, 2026
- *ALM*, [Private Client Global Elite Directory](#), 2026
- *The Best Lawyers in America*[®], Trusts and Estates, 2021-2026
- *Daily Journal*, Top Estate & Wealth Management Attorneys, 2025
- *Super Lawyers* Southern California Rising Stars, 2009-2022

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

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*)
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Publications

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

July 20, 2023

Navigating International Legal Considerations for Advisors Serving Multi-National Families

WealthManagement.com

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

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.