Farella Braun + Martel

Stephanie Hood

Special Counsel

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San Francisco: 415.954.4481

Stephanie Hood works with individuals and families to implement tax-efficient estate plans that stay true to the individual needs of each of her clients.

She advises clients on a variety of domestic and international trust, estate, and tax matters. Stephanie assists individuals and families with the design, preparation, and implementation of their estate plans. She is experienced in tax planning techniques and valuation discount strategies that minimize income, gift, and estate tax consequences of multigenerational wealth transfers. Specifically, she structures and enacts valuation discount strategies that accomplish the client's wealth transfer and philanthropic objectives while maximizing tax opportunities.

In addition to lifetime planning, Stephanie represents families and fiduciaries through the postmortem planning and administration process. From probates to trust administrations, Stephanie approaches complex postmortem challenges with creativity. Recognizing that each client and family situation is unique, she provides solutions for difficult funding, distribution, and transfer issues. Stephanie regularly steers clients through the nuances of the local property tax laws in a way that minimizes property tax reassessment.

Stephanie prepares and reviews gift, estate, and trust tax returns. Additionally, she leverages her income tax and accounting background to counsel and defend her clients against audits brought by the Internal Revenue Service and other taxing authorities. She has successfully negotiated settlements with the IRS and the Tax Appeals Officers.

Previously, Stephanie was a licensed Certified Public Accountant.

Distinctions

- *Best Lawyers in America:* Ones to Watch, Trusts and Estates (2024)

Memberships and Affiliations

- Publications Chair, Estate and Gift Tax Committee, Taxation Section of the State Bar of California

Publications

February 26, 2024
Charitable Planning With Guest Stephanie Hood: Navigating Complex Rules and Traps for the Unwary
EO Radio Show - Your Nonprofit Legal Resource

August 3, 2023
Navigating Charitable Bequests: Risks and Rewards for Early Planning
Financial Advisor

July 7, 2023

Services

- Family Wealth
- Private Client

Education

- New York University (LL.M., 2011)
- University of Florida Levin College of Law (J.D., 2010)
  - *cum laude*, Estate Planning Book Award, Treasurer of Florida Association of Women Lawyers
- University of Miami (MAcc, 2005)
  - Award of Academic Merit
- Boston College (B.S., 2004)

Bar Admissions

- California
- Florida
- New York

Court Admissions

- U.S. Tax Court

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Navigating Charitable Bequests: Risks and Rewards for Early Planning

June 26, 2023
Charitable Bequests With Guest Stephanie Hood
EO Radio Show – Your Nonprofit Legal Resource

March 24, 2020
Wealth Transfer Strategies in Today's Market