



Stephanie Hood

Senior Associate

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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 plan. 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.

Stephanie is also a licensed Certified Public Accountant.

Memberships and Affiliations

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

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