

Elizabeth A. Stephan

Experience

With almost 20 years of experience, Elizabeth Stephan joined Smith & Zuccarini in 2020. She is experienced in the development of estate plans and has advised on the administration of probates and trusts, including the preparation of Washington state and federal estate tax returns. She regularly prepares wills, trusts, powers of attorney and other estate planning documents necessary to implement the client's personal and tax goals. She also has experience with family entity formation and planning.

Prior to joining Smith & Zuccarini, P.S., Elizabeth was the Director of the Estate and Transition Services Group at Berntson Porter, an accounting firm, (2017-2020) and was also an associate attorney with Oak Street Law Group (2010-2017) and Stoel Rives, LLP in Seattle (2000-2010).

Representative Work

- Prepared and advised regarding federal and state estate tax returns
- Prepared advised and negotiated prenuptial agreements involving first and second marriages
- Drafted and reviewed a wide range of estate planning documents, including: wills, revocable living trusts, community property agreements, durable powers of attorney, health care directives, and customized beneficiary designation forms for retirement accounts and insurance policies. • Counseled high net worth clients regarding federal and state estate taxes, gift taxes, and generation-skipping transfer taxes.
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Professional Honors and Activities

- Member, East King County Estate Planning Council
- Member, Real Property and Probate and Trust Section Executive Committee, Washington State Bar Association (September 2019-September 2021)

Presentations

- Co-chair of the 2020 Annual Fall Probate and Trust Seminar, Washington Bar Association, December 4, 2020
- Co-chair of the 2019 Annual Fall Probate and Trust Seminar, Washington Bar Association, December 11, 2019

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Education

University of Michigan, J.D., 2000

Editor in Chief, *Michigan
Telecommunications and Technology
Law Review*

The Ohio State University, B.A., 1996,
summa cum laude

Admissions
Washington