

Stephanie M. Glavinos

Counsel



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Practices/Industries

- Trusts & Estates
- Estate & Gift Tax Controversy
- Succession Planning

Education

The Ohio State University
(B.A., 2000)
Cleveland-Marshall College of Law
(J.D., 2003)

Overview

Stephanie helps a range of clients, from individuals to businesses, with estate planning, probate estate administration, and business law matters. She represents high net worth clients and multi-generational families on trust, estate, and business succession planning matters. Whether it is developing gifting strategies, implementing asset protection techniques, or developing plans for probate avoidance, Stephanie takes a strategic, pragmatic approach to finding the right solution for each individual client. Stephanie's experience also extends to counseling businesses regarding organizational matters, such as formation, corporate governance, and the creation and maintenance of corporate records.

Experience

- Participates in appeals before the Internal Revenue Service and U.S. Tax Court in complex estate and gift tax matters.
- Assists families with the administration of Ohio and Florida trusts and probate estates.
- Represents multi-generational families and high net worth individuals in trust, estate, and succession planning matters.

Presentations

- "2021 Estate Planning Update," Ulmer & Berne LLP Webinar (May 2021)
- "Choice of Entity After Tax Reform – Understanding the Stakes," Ulmer Tax Seminar Series (July 2018)
- "Asset Protection Planning and Current Strategies," Society of Financial Service Professionals (September 2014)
- "Panel Discussion on Asset Protection Planning Strategies," Select Strategies for Insurance and Estate Planning Seminar (April 2014)
- "Advanced Planning with Life Insurance and Annuities," Protective Life Insurance Company Seminar (Winter 2012)

Publications

- "I am the trustee of a trust. Now what?" Crain's Cleveland Business (November 2019)
- "Estate Planning is Still Vital in the Current Tax Environment," Crain's Cleveland Business (November 2015)

Involvement

Professional Affiliations

- Ohio State Bar Association (*Estate Planning and Probate Law Section*)
- Florida Bar Association (*Real Property, Probate, and Trust Law Section*)

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Involvement (Cont)

Professional Affiliations (Cont)

- Cleveland Metropolitan Bar Association
- Estate Planning Council of Cleveland

Honors & Distinctions

- Named to the Ohio Super Lawyers Rising Stars list (2017-2018)

Admissions

- State of Ohio
- State of Florida
- U.S. District Court, Northern District of Ohio
- U.S. Tax Court