



## STEPHEN STAFFORD, J.D., LL.M.

PARTNER

[Stephen.Stafford@brownandstreza.com](mailto:Stephen.Stafford@brownandstreza.com)

### PRACTICE AREAS

Business Tax Planning

Business Representation

Business Succession Planning

Real Estate Transactions

Mergers & Acquisitions

Income Tax Planning

## ABOUT

Steve Stafford is a partner with the California law firm of Brown & Streza, LLP, which provides integrated business, estate, tax, and exemption planning for business owners and high-net-worth families. Steve advises closely held businesses, entrepreneurs, and real estate investors across the state of California through all phases of a business, from formation to exit.

Steve forms and structures corporations, limited liability companies and partnerships, with each decision custom tailored to the client's particular tax, liability protection, and succession planning objectives. As general counsel to closely held companies, he provides tax planning, risk management, corporate compliance, contract review and preparation, mergers and acquisitions, and business succession planning services. Steve's succession planning experience ranges from Buy-Sell Agreements, pre-sale restructuring, and sale of companies, intra-family buyouts, transferring the business and real estate interests of high net worth families to irrevocable trusts, to structuring succession plans for lawyers and accountants.

From forming start-ups to counseling multi-generation companies, and from helping new entrepreneurs grow their businesses tax efficiently, to advising seasoned owners regarding the purchase or sale of business interests, Steve takes a holistic approach to serving his clients. He frequently collaborates with his clients' CPAs, financial advisors, insurance brokers and estate planning attorneys to achieve a tax-efficient outcome and/or to better protect their businesses.

Steve received his Bachelor of Arts from the University of California, Berkeley, his Juris Doctor from the University of San Francisco School of Law, and his Master of Law in Taxation (LL.M.) from Chapman University School of Law.

Steve was a four-year letterman on the Cal Football Team during his undergraduate career, and remains involved with a variety of Cal Alumni organizations. Steve and his wife, Kirsten have four children and have been involved in a number of youth sports and community activities.

# PROFESSIONAL BACKGROUND

**Brown & Streza LLP**, Irvine, California

Partner, 2017-Present

Attorney, 2007-2016

**Master of Law (LL.M.) in Taxation**, Chapman University School of Law, 2009

**Gordon & Rees LLP**, San Francisco and Newport Beach, California

Attorney, 2003-2007

Juris Doctor, **University of San Francisco Law School**, 2002

**Gap Inc.**, San Bruno, California

Senior Retirement Benefits Analyst (1995-1999)

Real Estate Law Department, Legal Administrator (1999-2001)

**Coopers & Lybrand, LLP**, San Francisco, California

Associate Benefits Consultant, 1993-1995

Bachelor of Arts, **University of California, Berkeley**, 1993

Admissions:

**All California State Courts**

**United State District court for the Central District of California**

**United States Court of Appeals for the Ninth Circuit**

# PROFESSIONAL RECOGNITION

2023 - 2024 "Southern California Super Lawyer"

2009 - 2012 "Southern California SuperLawyers - Rising Star"

# PUBLICATIONS

Financing and Protecting California Businesses, February 2015

- Author, "Tax and Accounting Elections" Chapter of California's Continuing Education of the Bar (CEB)

Financing and Protecting California Businesses, February 2014

- Author, "Tax and Accounting Elections" Chapter of California's Continuing Education of the Bar (CEB)

Financing and Protecting California Businesses, February 2013

- Co-author, "Tax and Accounting Elections" Chapter of California's Continuing Education of the Bar (CEB)

# MEDIA MENTIONS

Orange County Register, February 22, 2015

- How Savvy Are You About Homeowner Tax Breaks? Take Our Quiz To Find Out
- Source for technical information related to a home office as an itemized deduction on taxes

## **SPEAKING ENGAGEMENTS**

California Lawyer's Association (CLA) Business Law Section Webinar, October 22, 2020

- Business Succession Planning Opportunities During Today's Unprecedented Times

Orange County Bar Association Business & Corporate Law Section Webinar, August 26, 2020

- Business Succession Planning Opportunities During Today's Unprecedented Times

California Lawyers Association (CLA) Webinar, January 24, 2019

- The Tax Cuts and Jobs Act - What Every Attorney Should Know

Financial Planning Association of Orange County (FPA) Quarterly Education Meeting, Irvine, California, August 15, 2018

- Tax Treatment of Business Entities under the Tax Cuts and Jobs Act

CalCPA Forensic Services, Irvine, California, February 8, 2017

- Tax Advantages of Business Entities

Harvard Business School and USC Marshall School of Business: Business Growth Conference 2011, Anaheim, California, May 9, 2011

- Buy-Sell Agreements and Business Entity Structures: Get it Right or Pay the Price

## **COMMUNITY INVOLVEMENT**

St. Edward the Confessor Catholic Church – Parishioner and Usher

University of California, Berkeley – Orange County Cal Alumni Club – Member  
Former Advisory Board Member

Orange County Bar Association, Business Law and Tax Law Sections – Member

ProVisors – Member

Host of Orange County Lawyers & Legal Professionals

Legatus – Member of San Juan Capistrano Chapter

St. Thomas More Society of Orange County – Member

Charles Institute – Leadership Team

Athletes Touch (Professional Networking Community of Former College and Professional Athletes) – Member, 2010–2020

Former Group Leader for Orange County Chapter, 2011–2015

Dana Hills High School Football's 2013 Honor the Valor Benefit Game – Co-Chair  
(Benefit/fundraiser honoring combat veterans that served from WWII to Afghanistan)

Former Coach – youth soccer, football, basketball and baseball teams

Big C Society (Cal Student – Athlete alumni) – Member  
Board of Directors, 1996–1998