

BROWN | STREZA



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

PARTNER

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PRACTICE AREAS

Business Tax Planning

Business Representation

Business Succession Planning

Real Estate Transactions

Mergers & Acquisitions

Income Tax Planning

ABOUT

Steve Stafford is a partner at Brown & Streza, LLP, which provides integrated business, estate, and tax 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. 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, intra-family buyouts, transfers to employees, transferring business and real estate interests to irrevocable trusts, and structuring succession plans for lawyers and accountants.

Known for his collaborative and holistic approach, Steve works closely with CPAs, estate planning attorneys, financial advisors, and other key professionals to deliver comprehensive, tax-efficient solutions to his clients.

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, are the proud parents of four adult children.

PROFESSIONAL BACKGROUND

Brown & Streza LLP

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 - 2026 "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

All Business is Personal Educational Video Series

- Episodes 1-15

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, Bible Study Table Lead, Marriage Preparation Ministry, and Usher

Legatus — Member, Board of Directors, and Program Chairman for San Juan Capistrano Chapter

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

Former Group Leader for Orange County Chapter, 2010–2015

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 — Former Member and Former Host of Orange County Lawyers & Legal Professionals

St. Thomas More Society of Orange County — Member

Charles Institute — Member and Former Member of Advisory Board

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