Stephanie Ross

Associate

Chicago Office

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Practices

FOCUS: Private Wealth

Business Succession Planning

Charitable Planning, Philanthropy and Nonprofit Organizations

International Private Wealth

Industries

Private Client Services

Education

JD, Loyola University Chicago School of Law

BA, Loyola University Chicago, *cum laude*

Bar Admissions

Illinois

Court Admissions

US Supreme Court

Community Involvements

Chicago Estate Planning Council

Stephanie Ross assists high-net-worth individuals and families in the design of custom estate plans. Clients rely on Stephanie for her advanced knowledge of various strategies to create tax-efficient transfers of wealth across generations. As someone who values the importance of engaging and educating younger generations, Stephanie strives to promote financial literacy as she helps clients navigate family wealth as it passes from one generation to the next.

Tax-efficient estate planning tailored to every client's personal goals

Stephanie has advanced knowledge in numerous areas of tax law, including fiduciary income tax and the transfer taxes. With a background as a wealth advisor for a leading financial services company, she has the depth of experience to provide clients with sophisticated wealth transfer planning to achieve their goals. Stephanie has handled all aspects of trust and estate administration, ranging from covering the entire probate court process to the preparation and filing of estate and gift tax returns.

Stephanie frequently writes and speaks on estate planning topics. In August 2022, she helped draft an amicus brief on behalf of The American College of Trust & Estate Counsel in *Alexandru Bittner v. United States*, US Supreme Court, No. 21-1195.

Publications

- 2023 Year-End Estate Planning Advisory (November 20, 2023)
- The Rule Against Perpetuities Is a Perpetual Pain | *Estate Planning Journal* (March 2022)

- Chapter 8 - Protecting Business Assets | Asset Protection Planning 2022 Edition | *Illinois Institute for Continuing Legal Education* (2022)
- Common Pitfalls When Using the Term "Per Stirpes" | *Estate Planning Journal* (September 2021)

Presentations and Events

- Estate, Probate, & Trust Seminar | Kane County Bar Association (June 15, 2023) | *Co-Presenter* | *Am I Doing this Correctly? A Discussion of the Decanting, Directed Trust and Trust Protector Provisions of the Illinois Trust Code*
- Illinois Institute for Continuing Legal Education Live Webcast (December 1, 2022) | *Speaker* | *Form 709: Federal Gift Tax Return*
- 44th Annual Duke University Estate Planning Conference (October 13–14, 2022) | *Panelist* | *Sincerity in Error – Common Errors and the Ethics of Correction*