

## Stephanie S. Downer

San Diego, California  
Shareholder

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### Areas of Practice & Industry Specialties

Tax, Benefits and Estate Planning; Corporate Law; Equine Law



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Stephanie S. Downer is a member of the Tax, Benefits, & Estate Planning practice group in Buchalter's San Diego office. She primarily focuses her practice in the areas of estate planning, wealth transfer planning, transfer tax minimization, trust administration, and probate law. Ms. Downer regularly advises professionals, families, and business owners in all aspects of estate planning including revocable living trust plans, gift and estate tax planning with irrevocable trusts, charitable gift planning, property tax planning, and trust administration.

Ms. Downer is a certified specialist in Estate Planning, Trust & Probate Law by the State Bar of California Board of Legal Specialization. Approximately only five percent of California's attorneys are certified as specialists by the State Bar of California. Ms. Downer further holds an LL.M. in Taxation from the University of San Diego School of Law.

### Publications

- Beware of Proposition 19 Property Tax Increases—Planning Opportunities Still Exist for a Brief Window, *Buchalter Client Alert*, November 17, 2020
- SECURE Act and CARES Act Impact Retirement Benefits for 2020 and Beyond, *The Daily Journal*, October 8, 2020

### Presentations

- Panelist, "Strategies for Intra-Family Succession of Closely Held Business & Sales," ESTATE PLANNING COUNCIL OF SAN DIEGO, June 18, 2024
- Presenter, "Estate Planning Issues with Beneficiary Designations and Custodial Implementation," The National Association of Personal Financial Advisors, May 11, 2023
- Speaker, "Memory Loss and Staying in Control of Your Finances: What You Need to Know," Estate Planning and Incapacity Panel, June 15, 2022
- Speaker, "Estate Planning for Women," Edward Jones Event, March 9, 2022
- Speaker, "Estate Planning Fundamentals," Webinar for Deputy Sheriffs' Association of San Diego, August 5, 2020
- Speaker, "Estate Planning and Charitable Giving- How to Create A Legacy," Pacific Premier Bank Workshop Series, February 12, 2020

### Education

Ms. Downer received her J.D. and LL.M. in taxation from the University of San Diego and her B.A. from the University of California, Santa Barbara. Additionally, she spent nearly three years studying applied mathematics and computer science at New York University.

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**Bar Admissions**

- California

**Community**

- Member, Estates and Trusts Council for the Rady Children's Hospital Foundation
- Member, North County Estate Planning Council and Lawyers Club of San Diego