



STEPHANIE LOOMIS-PRICE PARTNER

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Stephanie Loomis-Price represents taxpayers in federal gift and estate tax litigation against the Internal Revenue Service (IRS), as well as in state fiduciary and probate controversy work. In her national practice, she has assisted clients in numerous federal tax cases in the U.S. Tax Court, the U.S. Court of Federal Claims, and the U.S. Courts of Appeals for the Fifth, Eighth, and Eleventh Circuits. In addition, she has appeared before state, district and county probate courts in Texas.

Stephanie advises clients regarding estate administration and helps them minimize litigation and audit risks. Her practice also includes counseling executors, trustees, and beneficiaries regarding funding, administration, taxation, distribution, and termination of estates and trusts. She prepares, reviews, and files federal transfer tax returns and assists trustees and beneficiaries with judicial and nonjudicial modifications to irrevocable trusts. Stephanie also obtains private letter rulings (PLR) from the IRS on estate, gift, and generation-skipping transfer tax matters. Finally, when tax disputes remain unresolved, Stephanie and her team defend taxpayers in trial.

Experienced in helping business owners, Stephanie also advises on tax-efficient succession planning with a focus on minimizing litigation and audit risk. She also assists families in designing, funding, and maintaining closely held businesses in a manner designed to minimize litigation and audit risk.

Stephanie regularly speaks nationwide on topics related to gift and estate tax matters.

Professional Recognition

- Board Certified in Estate Planning and Probate Law, Texas Board of Legal Specialization
- Named "Lawyer of the Year" - Litigation - Trust and Estates by *The Best Lawyers in America*, 2020
- Named Tax Lawyer of the Year by the Corporate LiveWire Global Awards, 2021, 2022
- Inducted into the National Association of Estate Planners & Councils (NAEPC) Estate Planning Hall of Fame, 2018
- Named Federal Tax Lawyer of the Year - USA by CorporateLiveWire, 2018
- Ranked in *Chambers High Net Worth Guide* by Chambers and Partners, 2017 – 2022
- Recognized by Corporate LiveWire - Global Awards for Excellence in Tax Law Services, 2017
- Listed in the Who's Who - Legal Private Client by Law Business Research Ltd., 2014, 2016 – 2020
- Listed among the Top 50 Women by *Texas Super Lawyers*, 2016
- Recognized by *Super Lawyers Magazine* as a "Texas Super Lawyer," 2010 – 2022
- Recipient of the Judge Thomas Gibbs Gee Award for Outstanding Pro Bono Service, 2009

- Recipient of the Excellence in Writing Award, Probate & Property, 2008
- Named a Texas Rising Star by *Thomson Reuters*, 2006

Professional Leadership

- American College of Trust and Estate Counsel (ACTEC), **Fellow and Past Regent**
- American College of Tax Counsel (ACTC), Fellow
- Heckerling Institute on Estate Planning, Advisory Board Member
- American Bar Association Section of Real Property, Trust and Estate Law, Immediate Past Chair
- American College of Trust and Estate Counsel, Business Planning Committee, Past Chair
- ALI-CLE Estate Planning Program Committee, Advisor
- Houston Business & Estate Planning Council, Member

Areas of Focus

PRACTICES

- Trust & Estate Planning

Bar and Court Admissions

- Texas
- U.S. Tax Court
- U.S. Court of Federal Claims
- U.S. Court of Appeals for the Fifth Circuit
- U.S. Court of Appeals for the Eighth Circuit
- U.S. Court of Appeals for the Eleventh Circuit
- U.S. Bankruptcy Court for the Southern District of Texas

Education

- Georgetown University Law Center, J.D., *cum laude*, 1998, Managing Editor, *Georgetown Journal of Legal Ethics*
- Johns Hopkins University, M.S., Applied Behavioral Science, 1996
- Austin College, B.A., International Studies and Spanish, with honors, 1989