Snell & Wilmer

Stephanie B. Casteel

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Main Bio

Stephanie ("Stevie") Casteel is a trusted advisor to a wide range of high net worth and exempt organization clients and is a partner in the firm's Private Client Services practice group. She provides comprehensive estate planning advice, including wills, trusts, powers of attorney, charitable planning, nuptial agreements, NINGs, asset protection, estate and trust administration, planning for estate and gift taxes, and business wealth transitions for clients throughout the United States. She also assists exempt organizations with formation, tax exemption, lobbying affiliates, tax compliance, and board policies and best practices. A frequent speaker, Stevie has presented at national conferences on the topics of estate planning, non-profit law, and charitable giving and has authored or been quoted in numerous articles in trade journals and national media outlets, including CNN, on topics such as premarital agreements, charitable bequests and wealth management for women.

Representative Experience

- Provided estate planning counsel to more than a dozen clients with wealth in excess of $100 million
- Assisted $200+ million private foundation with grants and economic development for a rural community
- Advised $100+ million entrepreneur regarding innovative charitable projects
- Local counsel to estate of notable real estate developer and neo-futuristic architect
- Advised nearly $100 million corporate charity located in the Southeast United States
- Reformed and decanted poorly drafted trusts after sale of privately held company
- Developed experience in non-grantor incomplete gift trusts
- Assisted dozens of clients with transfers of their wealth to successive generations
- Advised high-profile clients on matters of wealth transfer, business succession planning, nuptial agreements, charitable planning and exempt organizations
- Assisted in transferring multi-million-dollar company to second and third generations with no transfer tax
- Advised large hospital on employee relief plans
- Handled large estate tax audit with forestry assets
- Prepared Tax Court petition contesting valuation of large lighting company
- Applied wealth transfer planning techniques to the estates of high net-worth clients

Education

- Emory University School of Law (J.D., with distinction, 1991)
- Agnes Scott College (B.A., Economics, with High Honors, 1988)

Professional Memberships & Activities

- American College of Trusts & Estates Counsel
  - Board Regent (appointment confirmed in March 2020)
  - Foundation Board of Directors (2017-present)
  - Asset Protection Committee (2015-present)
  - Charitable Planning & Exempt Organizations Committee (2008-present)
  - Audit Committee (2013-present)
    - Chair (2017-present)
  - Sponsorship Committee (2018-present)
  - Program Committee (2013-2016)
  - New Fellows Steering Committee (2010-2015)
    - Secretary (2014-2015)
- American Law Institute-Continuing Legal Education
  - Estate Planning in Depth, Co-Chair (2014-2018)
  - Estate Planning Advisory Panel (2013-present)
- American Bar Association, Real Property, Trusts & Estates Law Section
  - Articles Editor, Probate and Property (2015-2018)
  - Charitable Planning Committee
    - Chair (2012-2017)
    - Vice-Chair (2007-2009)
  - FAQ Communications Committee Chair (2012)
  - Legislative and Regulatory Issues Committee Chair (2009-2012)
  - Sponsorship Standing Committee (2009-2013)
  - Associate Articles Editor, Probate and Property (2008-2018)
  - Business Planning Group Committee (2004-2005)
- State Bar of Georgia
  - Fiduciary Law Section: Trust Code Steering Committee (2008-2009)
  - Uniform Prudent Management of Institutional Funds Act Committee (2006-2008)
  - Fiduciary Legislation Committee (1994-1998, 2005-2008)
  - Basic Fiduciary Practice Chair (2005-2007)
  - Principal & Income Act Drafting Committee (2002-2005)
- State Bar of Nevada
  - Member
- Atlanta Estate Planning Council (2004-2010)
  - Board of Directors (2006-2008)

Representative Presentations & Publications

- "Tax Aspects of Marriage Dissolution," Speaker, Estate Planning In Depth, ALI-CLE (June, 24, 2021)
- "How to Deduct Charitable Donations From Your Taxes," Quoted, TheStreet (May 26, 2020)
- "14 Things To Know About Making End-of-Year Donations," Quoted, TheStreet (December 23, 2019)
- "We asked 2 Reno legal experts: What are the dos and don'ts of corporate giving?" Quoted, Northern Nevada Business View (November 27, 2019)
- "Optimizing Lifetime Gifting: Advising Clients in Uncertain Times," Speaker, Hawaii Tax Institute, Honolulu (November 2019)
- "Charitable Gift Substantiation," Speaker, 2019 Charitable Gift Planning Conference, National Association of Charitable Gift Planners, New Orleans (October 2019)
- "Basic Charitable Planning Techniques," Speaker, Hawaii Tax Institute (November 2018)
- "The Dating Game: Choosing Between Multiple Jurisdictions," Speaker, New Hampshire Trust Conference, (October 2018)
- "Planning and Drafting Nuptial Agreements," Speaker, Estate Planning in Depth, ALI-CLE (June 2017)
- "Charitable Bequests of Retirement Assets: Strategies, Traps, and Solutions," Speaker, ACTEC Annual Meeting (March 2017)
- "The Dating Game: Choosing Between Multiple Jurisdictions," Speaker, Delaware Tax Institute (October 2017)
- "Charitable Bequests of Retirement Assets: Strategies, Traps, and Solutions," Speaker, Hawaii Tax Institute (November 2017)
- "My Way: What is the Donor's Best Charitable Game? The Anatomy of Supporting Organizations," Speaker, ACTEC Annual Meeting (March 2016)
- "Nuptial Agreements," Author, ALI-ABA Estate Planning Course Materials Journal (2016)
- "Charitable Giving," Speaker, Estate Planning in Depth, ALI-CLE (June 2015)
- "A Cool Idea with Rev. Rul. 2004-5, New Uses for Charitable Gift Annuities, and Report on Notice 2014-4," Speaker, ACTEC Annual Seminar, Charitable Planning and Exempt Organizations Committee (March 2014)
- "I Do, Act II: Estate Planning for Second Marriages," Speaker, ALI CLE teleseminar/audio webcast (March 2014)
- "Charitable Planning Potpourri," Speaker, Advanced Estate Planning Techniques, ALI-CLE (February 2014)
- "Charitable Planning Today," Speaker, 48th Annual Heckerling Institute on Estate Planning (January 2014)
- "Planning and Drafting Premarital Agreements," Author, ALI-ABA Estate Planning Course Materials Journal (April 2010)
- "Philanthropy and Choice of Grant-Making Entity in a Changing World," Author, Property & Probate (March/April 2009)
- "The Bio-Tech Company and The Private Equity Fund," Author, Tech Journal South (August 22, 2008)
- "It's Not About the Teacups," Author, Atlanta Woman (July 2008)
- "Hit the Jackpot? Here's some advice on what to do next," Quoted, Atlanta Journal-Constitution (February 18, 2008)

- “Planning and Drafting Premarital Agreements,” Author, The Practical Tax Lawyer, Vol. 20 No. 1 (Fall 2005)
- “The Women's Guide to Wealth Management: Atlanta's Top Legal and Investment Experts Share Tips and Insights to Ensure Your Financial Well-Being,” Editor and Co-Author, Atlanta Homes & Lifestyles (December 2005)

Professional Recognition & Awards

- The Best Lawyers in America®, Non-Profit/Charities Law and Trusts & Estates (2009-2022)
  - Lawyer of the Year, Reno Non-Profit/Charities Law (2021)
- Chamber's High Net Worth Guide (2017-2018)
- Peer Review Rated AV Preeminent, Martindale-Hubbell®
- Georgia Trend's Legal Elite (2010-present)
- Georgia Super Lawyer, Law & Politics Magazine (2005-present)
  - Top 50 Woman Lawyers (2009-2013)

Previous Professional Experience

- Wallace Morrison & Casteel, Founding Partner (2011-2019)
- King & Spalding, LLP, Partner (2004-2010)
- Powell Goldstein Frazer & Murphy, LLP, Partner (2002-2004)

Bar Admissions

- Nevada
- Georgia