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Michael J. Stegman

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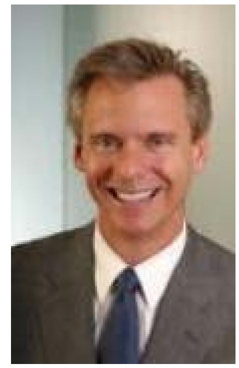

Michael J. Stegman has over twenty-five years experience in the areas of estate planning and trust administration. He focuses on the preservation and transfer of wealth and the legal reduction of transfer taxes. He represents individual private clients and corporate and individual fiduciaries. In particular, he concentrates in:

- Family legacy planning over multiple generations, with an emphasis on flexible trust arrangements, asset protection, charitable giving, and the use of private family foundations.
- The international aspects of planning for U.S. expatriates and for U.S. citizens with foreign property holdings.
- Cross-border property and inheritance/gift tax issues affecting foreign nationals holding U.S. assets or living in the U.S., either as a permanent resident (Green Card holder) or temporarily.
- The establishment of private charitable foundations for both domestic and foreign grantmaking.

Mr. Stegman is a certified Specialist in Estate Planning, Trust and Probate Law, as certified by the Ohio State Bar Association. In 2008, Mr. Stegman was appointed to the Governing Council of the Estate Planning, Trust and Probate Law Section of the Ohio State Bar Association. The Council is charged with monitoring trust and estate law and drafting new legislation for consideration by the Ohio General Assembly.

Professional Publications/Presentations:

- Article, "Confronting the New Expatriation Tax:Advice for the U.S. Green Card Holder,"Journal of the American College of Trust & Estate Counsel, Vol. 35, No. 3, Winter 2009 (co-authored with John L. Campbell) download now
- Article, "Breaking Up is Harder to Do: The New Alternative Tax Regime on U.S. Expatriates," Probate Law Journal of Ohio, Sep./Oct. 2009. download now
- Article, "The Noncitizen Spouse: Implications for Estate Planning and Administration", Probate Law Journal of Ohio, Jan./Feb. 2009. download now
- Presentation, "The New Alternative Tax Regime on U.S. Expatriates," Estate Planning Conference on Wealth Transfer, Columbus, Ohio, June 2009.
- Presentation, "The Decanting - Friendly Trust : A Second Look after the Second Death", to the Cincinnati Estate Planning Council, Cincinnati, Ohio, May 2010
- Presentation, "The International Executive As A Client", to the National Association of Personal Financial Advisors, Chicago, Illinois, May 2010
- Presentation, "Taking Full Advantage of Ohio Marital Deductions", at Advanced Estate Planning Institute of the Cincinnati Bar Association, Feb. 2006. download now

Practice Areas

- Real Estate
- Business Law and Transactions
- Estate Planning and Administration

Education:

J.D., New York University School of Law (1983)

B.A., University of Notre Dame (1980), *magna cum laude*, member *Phi Beta Kappa*

Foreign Study : University of Innsbruck, Austria (1977-78)

Awards and Honors:

Martindale-Hubbell AV Rated

Recognized as an Ohio Super Lawyer by *Law and Politics* in conjunction with *Cincinnati Magazine*

Certifications and Professional Associations:

Certified Specialist in Estate Planning, Trust & Probate Law, as certified by the Ohio State Bar Assoc.

Member, Governing Council of the Estate Planning, Trust and Probate Law Section, Ohio State Bar Assoc.

- Trust Decanting Committee
- Ohio Legacy Trusts (Domestic Asset Protection Trusts) Committee
- Ohio Elective Community Property Law Committee (Chair)

Professional Memberships:

Cincinnati Bar Association (Chair of Planning Committee for Advanced Estate Planning Institute, 2010)

Ohio State Bar Association

Cincinnati Estate Planning Council

Estate Planning Council of Northern Kentucky (President, 2007)

Kentucky Bar Association

Admitted to Practice:

State of Ohio (1983)

Commonwealth of Kentucky (1984)

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