

# Stephanie K. Grissom

## Associate

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### PRACTICE AREAS

Estate Planning and Probate

Income Tax and Business Planning



### Biography

Ms. Grissom practices in the areas of Estate Planning and Probate, and Income Tax and Business Planning. She advises and assists clients with their estate planning and business succession needs utilizing a variety of techniques and legal devices to achieve client's estate planning goals. Ms. Grissom works with clients to develop a plan to preserve their wealth which often includes the preparation of estate planning documents including trusts and wills. She also represents executors assisting in estate administration and settlement of estates, and the preparation of estate tax returns. Her income tax and business planning practice includes federal, state and international tax planning for individuals and a variety of businesses with the goal of minimizing tax obligations while accomplishing their business objectives.

Ms. Grissom was admitted to practice in Texas in 2019.

### Education

- New York University School of Law, LL.M. in Taxation, 2020
- Texas Tech University School of Law, J.D., *summa cum laude*, 2019
  - *Order of the Coif*
  - Texas Tech Law Review Vol. 51, Articles Editor
- Texas Tech University, B.A., Psychology, Mathematics Minor, 2012

### Memberships

- American Bar Association
  - Tax Section
  - Real Property, Trust and Estate Law Section
- State Bar of Texas
  - Tax Section
  - Real Estate, Probate, and Trust Law Section
- Dallas Bar Association
  - Tax Section
  - Probate, Trusts and Estates Section

### Admissions

- Texas, 2019

### Honors & Awards

- Edward R. Smith and Norton Baker Tax Award Recipient
- State Bar of Texas Tax Section Scholarship Award Recipient

### Blog

- July 14, 2022 - Certain Estates Now Have Five Years to Make a Portability Election  
On Friday, July 8, 2022, the IRS released Revenue Procedure 2022-32, which supersedes Revenue Procedure 2017-34 and extends the period of time certain estates have to make a "portability" election under IRC sec. 2010(c)(5)(A). A portability election allows for a surviving spouse to utilize the deceased spouse's unused exclusion amount (DSUE). The portability election may only be made on a timely filed federal estate tax return (Form 706).