



Stephanie Loomis-Price

Achieving Audit Readiness: A Litigator's Look at the IRS's Transfer Tax Focus Issues

Please join us for our first **in-person** meeting of the year. We will be meeting on September 26th at the Omni Hotel in San Francisco at 5:00 pm for a social hour with hors d'oeuvres and cocktails, followed by our featured speaker, Stephanie Loomis-Price at 6:00 pm.

This session will provide practical tips with some discussion on recent developments in audits and case law related to creation and maintenance of family limited partnerships. Topics addressed will include: 1) determining when it is not feasible to create a partnership; 2) advising clients on proper entity formation and operation; and 3) optimizing partnership maintenance to minimize IRS attacks.

Stephanie Loomis-Price is a shareholder in Winstead's Wealth Preservation Practice Group, where she handles federal gift and estate tax litigation against the Internal Revenue Service across the country, as well as state fiduciary and probate controversy work in Texas courts. She also counsels clients nationally regarding complex estate administration and litigation and audit risk minimization.

Board Certified in Estate Planning and Probate Law, Stephanie is a Fellow and Past Regent of the American College of Trust and Estate Counsel (ACTEC), where she recently served as Chair of ACTEC's Business Planning Committee. She is also a Fellow of the American College of Tax Counsel (ACTC), and she serves as Immediate Past Chair of the Real Property, Trust & Estate Law Section of the American Bar Association.

Stephanie has represented clients before the United States Tax Court, the United States Court of Federal Claims, and United States Court of Appeals for the Fifth, Eighth, and Eleventh Circuits in such ground-breaking cases as *Bongard*, *Christiansen*, *Cook*, *Dunn*, *Hendrix*, *Holman*, *Jameson*, *Kerr*, *McCord*, *Petter*, and *Stone*. A graduate of The Georgetown University Law Center, Stephanie has been recognized in The Best Lawyers in America publication, as one of the Top 50 Women attorneys in Texas by *Texas Monthly*, and in *Who's Who Legal: Private Clients*. Stephanie lives in the Houston area with her husband, Larry Loomis-Price. They have two college-aged sons, Connor and Corwin.

Join us on Wednesday, September 28, 2022

5:00 PM – 6:00 PM **Social Networking/hors d'oeuvres and cocktails**

6:00 PM – 7:00 PM **Meeting**

Omni Hotel – 500 California (at Montgomery) in San Francisco

\$85 Pre-registered Members - \$105 Pre-registered Guests

At the door – Registrations still needed - \$90 members and \$110 guests

Pre- Registration is Required

Reservation needed by September 26, 2022

[Register Here](#)

MCLE: This activity is approved for MCLE credit of one hour by the State Bar of California & CFP®.

Excused Absence: Members can request an excused absence by sending an email (info@sfepec.org) to the Council Office prior to the meeting.

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