

# Lacey Stevenson

Associate

**Practices:** Wealth Preservation

Lacey Stevenson is a member of Winstead's Wealth Preservation Practice Group. Lacey has extensive experience as a tax attorney with particular emphasis on matters involving fiduciaries, trusts, and high net worth individuals and their families.

## Representative Experience

- Design and prepare primary estate planning documents, such as revocable trusts, wills, and financial and medical powers of attorney
- Advise and assist executors, trustees, and beneficiaries with the funding, administration, taxation, and distribution of trusts and estates
- Design, implement, and monitor transfer tax minimization strategies, such as gifts to family trusts, installment sales to grantor trusts, and grantor retained annuity trusts (GRATs)
- Assist families with the formation of closely-held businesses to own and manage family assets
- Prepare and review federal gift tax returns (IRS Forms 709) and federal estate tax returns (IRS Forms 706)
- Assist trustees with judicial and non-judicial modifications / reformations to irrevocable trusts
- Assist clients with the formation of tax-exempt organizations

## Professional & Community Service

- State Bar of Texas
- Oklahoma Bar Association

## Admissions

- Texas
- Oklahoma



### Dallas Office

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### Education

New York University School of Law

– LL.M., Taxation, 2019

– Senior Staff Editor, *NYU Tax Law Review*

Baylor Law School

– J.D., 2016

– *magna cum laude*

– Articles Editor, *Baylor Law Review*

– Baylor Law's Dean's Academic Excellence Full-Tuition Scholarship

University of Oklahoma

– B.A., Political Science, 2012

– Phi Beta Kappa