

Snell & Wilmer



Steffi Hafen

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Main Bio

Steffi Hafen is the managing partner of our San Diego office, and is a Certified Specialist in Estate Planning, Trust and Probate Law, California Board of Legal Specialization. She is a co-leader of the firm's Private Client Services practice group, a partner in the General Federal Tax practice group and works in the San Diego, Orange County and Los Angeles offices. Steffi's practice is concentrated in tax, trust, and estate matters with emphasis in estate planning, trust and probate administration, and estate and gift taxation. She employs advanced estate planning techniques, including grantor retained annuity trusts, family partnerships, limited liability companies, charitable remainder trusts, defective grantor trusts, insurance planning, public charities, and private foundations. She also advises clients regarding succession planning for closely held businesses. In addition, Steffi has experience in state and local taxation, including income taxation, sales and use taxation, and property taxation, as well as issues regarding residency and domicile. Steffi also represents clients in front of the California state and local taxing authorities, and the Internal Revenue Service. She works with clients' certified public accountants, financial planners, and other service providers to provide holistic solutions to clients' needs.

Education

- Loyola Law School (LL.M. in Taxation, with distinction)
- University of Southern California, Gould School of Law (J.D.)
 - Moot Court Executive Board and National Team Member
- University of California, Santa Barbara (B.A., Psychology and Law and Society)
- Lorenzo de' Medici University, Florence, Italy (Study Abroad)

Languages

- Spanish

Professional Memberships & Activities

- San Diego County Bar Association (2020-Present)
 - Estate Planning, Trust & Probate Section, Vice Chair (2021-Present)
- Lawyers' Club (2020-Present)
- Association for Corporate Growth (ACG), San Diego (2020-Present)
- North County Estate Planning Council (2020-Present)

- Orange County Bar Association (2011-Present)
 - Trusts and Estates Section
 - Tax Section
- Orange County Estate Planning Council (2017-Present)
 - Attorney Member
- Orange County Hispanic Bar Association
 - Board of Directors (2013-2019)
- USC Law Alumni OC Committee (2012-2016)
- Los Angeles County Bar Association, Young Tax Lawyers, Secretary (2010-2011)

Representative Presentations & Publications

- ["Are You Making the Most of Charitable Planning?"](#) Episode Host, CalCurrent Podcast (December 8, 2022)
- ["Estate and Tax Planning for Private Equity Fund Principles,"](#) Episode Host, CalCurrent Podcast (March 10, 2022)
- "Securing Your Business and Legacy Through Estate Planning," Speaker, SBDC @ University of California, Irvine Beall Applied Innovation Incubator (September 14, 2021)
- ["Tax Planning for Qualified Small Business Stock \(QSBS\),"](#) Episode Host, CalCurrent Podcast (August 26, 2021)
- ["What Tax Court's Mylan Legal Fee Ruling Means For IP Suits,"](#) Co-Author, Law360 (June 9, 2021)
- ["CalCurrent's 50th Episode!"](#) Episode Co-Host, CalCurrent Podcast (June 3, 2021)
- ["Pre-Immigration Tax Planning 101,"](#) Episode Host, CalCurrent Podcast (March 25, 2021)
- "Diversity in the Workplace: How Industry Leaders Have Successfully Implemented DEI Programs," Panelist, USC Diversity, Equity, & Inclusion Week (March 9, 2021)
- ["Handling the Death of a Loved One: A Legal Checklist,"](#) Episode Host, CalCurrent Podcast (December 17, 2020)
- ["Can the Creation of the California Fire Response Fund Lead to a Tax Increase? What You Should Know About Prop 19,"](#) Episode Host, CalCurrent Podcast (November 25, 2020)
- ["Using SLATs to Lock in Your Gift and Estate Tax Exemption Now,"](#) Episode Host, CalCurrent Podcast (September 24, 2020)
- ["Estate and Gift Tax in an Election Year,"](#) Episode Host, CalCurrent Podcast (August 20, 2020)
- ["GRATs and CLATs and QPRTs, Oh My! - Estate Planning in a Low Interest Environment,"](#) Episode Host, CalCurrent Podcast (July 30, 2020)
- ["Virtual Estate Planning,"](#) Episode Host, CalCurrent Podcast (July 1, 2020)
- ["Managing Business Needs During a Pandemic: Tax/Charity,"](#) Presenter, Snell & Wilmer Live Webinar to ACC SoCal (April 8, 2020)
- ["Gift Tax and GST Tax: Deadline to Report and Pay Tax Extended,"](#) Author, Snell & Wilmer Legal Alert (April 6, 2020)
- ["Tax and Estate Planning in the Current Environment,"](#) Author, Snell & Wilmer Legal Alert (March 23, 2020)
- ["California COVID-19 Tax Relief,"](#) Author, Snell & Wilmer Legal Alert (March 20, 2020)

- "Securing Your Legacy Through Estate Planning," Presenter, Entrepreneurs' Organization Orange County (EO OC) Event, Costa Mesa, CA (April 17, 2019)
- "Staying Tax Exempt," (Training Program for Pro Bono Nonprofit Organizations Legal Assessment Clinic), Co-Presenter, ACC-SoCal, Public Law Center, Snell & Wilmer Orange County Offices, Costa Mesa, CA (April 4, 2019)
- "[Estate Planning for Cryptocurrency Doesn't Need to be Cryptic](#)," Author, Lex Mundi Blockchain White Paper Series (February 6, 2019)
- "[Don't Lose Your Client's Cryptocurrency in Cyberspace](#)," Co-Author, Wealth Management (September 20, 2018)
- "[How the Rich Can Dodge Trump's Property Tax Hike](#)," Quoted, Bloomberg News (June 15, 2018)
- "[Does the Floor Number of My Los Angeles Condo Determine the Taxes I'll Pay?](#)" Quoted, Mansion Global (February 15, 2018)
- "[The Down and Dirty on the New Tax Rules and Estate Planning](#)," Author, Accounting Today (February 8, 2018)
- "['Repeal the Estate Tax!' And Other Sound Bites](#)," Co-Author, Orange County Business Journal (October 2, 2017)
- "[A Death in the Family - Now What?](#)" Co-Author, Orange County Business Journal (March 14, 2016)
- "[Estate Planning in 2015](#)," Co-Author, Orange County Business Journal (October 12, 2015)
- "Law Firm Models: Improving Gender Equity and Performance," Roundtable Presenter, American Bar Association Women of the Section of Litigation Conference, Chicago, IL (November 5-7, 2014)
- "Negotiate Your Way to Success: Best Practices for Women Rainmakers," Co-Moderator, ABA Women Rainmakers Spring Workshop, Costa Mesa, CA (May 9, 2014)
- "[Estate Planning in 2014](#)," Co-Author, Orange County Business Journal (April 7, 2014)
- "Strategic Networking: A Guide for Women Rainmakers," Co-Moderator, ABA Women Rainmakers Fall Workshop, Costa Mesa, CA (November 5, 2013)
- "[The 'Permanent' Relief Act](#)," Co-Author, Orange County Business Journal (June 24, 2013)
- "[The Disappearing Estate and Gift Tax Exemption](#)," Co-Author, Orange County Business Journal (September 17, 2012)

Professional Recognition & Awards

- [2023 Women of Accomplishment](#), San Diego Metro (2023)
- The Best Lawyers in America[®], Trusts and Estates (2023)
- [Business Women of the Year 2022 Finalist](#), San Diego Business Journal (2022)
- [Top 100 Leaders in Law 2022 Honoree](#), San Diego Business Journal (2022)
- [2022 40 Under 40 Winner](#), San Diego Metro (2022)
- [Women of Influence in Law 2022 Honoree](#), San Diego Business Journal (2022)
- [2022 Top Attorneys](#), San Diego Metro (2022)
- [2022 Women of Accomplishment](#), San Diego Metro (2022)
- [Leaders in Law 2021 Winner](#), San Diego Business Journal (2021)
- [Business Women of the Year Awards 2021 Finalist](#), San Diego Business Journal (2021)
- [2021 40 Under 40 Winner](#), San Diego Metro (2021)

- [Top Latino Lawyers of 2020](#), Latino Leaders Magazine (2020)
- [Business Women of the Year Awards 2020 Finalist](#), San Diego Business Journal (2020)
- [Leaders in Law 2020 Finalist](#), San Diego Business Journal (2020)
- [2020 Next Top 40 Under 40 Winner](#), San Diego Business Journal (2020)
- [On the Rise - Top 40 Young Lawyers Honoree](#), American Bar Association (2019)
- [Top Latino Lawyers of 2019](#), Latino Leaders Magazine (2019)
- Southern California Super Lawyers, Rising Stars Edition, Estate Planning and Probate (2018-2020)
- [Top Latino Lawyers of 2018](#), Latino Leaders Magazine (2018)

Community Involvement

- Boys & Girls Clubs of Long Beach
 - Board of Directors (2018-2022)
- OC Head Start
 - [Chairman of the Board](#) (2019-2022)
 - Board Member (2016-2022)

Previous Professional Experience

- Baker & McKenzie, Associate (2011), Summer Associate (2009)
- Warner Brothers Studios, Music Legal Department, Summer Intern (2004)

Bar Admissions

- California

Court Admissions

- Supreme Court of California