

Stephanie E. Sanderson-Braem

Partner

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Philadelphia, PA

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Stephanie Sanderson-Braem focuses her practice on estate and tax planning, trust and estate administration, and estate and trust litigation.

Stephanie represents single individuals, families with young children, families preparing for retirement, families having a child with special needs, closely held business owners, doctors, CEOs, and fiduciaries managing all aspects of trust and estate administration. She advises her clients on premarital agreements, business succession planning, lifetime giving and charitable giving in addition to the preparation and implementation of wills, trusts, powers of attorney, and advance directives. Stephanie provides clients with assistance in more complex planning involving life insurance trusts, family limited partnerships, intentional defective grantor trusts and grantor retained annuity trusts.

Stephanie also represents individuals, banks and trust companies serving as executors and trustees for trusts and estates of various sizes and complexities.

While pursuing her J.D., Stephanie worked in the executive compensation department at PricewaterhouseCoopers. Prior to law school, Stephanie was a tax associate at PricewaterhouseCoopers, LLP and a tax associate at LiCastro and Reidy, CPAs.

RESULTS

- advised a producer and distributor of novelty ice cream products in the acquisition of a controlling interest by a private investment firm
- represented a national bank in 20 different New Jersey cases to successfully have the bank resign as corporate trustee of various trusts
- represented a significant religious organization in asset protection planning and non-profit corporate restructuring
- represented estates of special needs decedents in the termination of their special needs trusts
- represented a client in a record-setting auction sale of a rare pre-revolutionary pie-crust table – attributed to the Garvan carver – which dates back to the early 1760s; auctioned by Christie's, the antique table sold for more than \$6.7 million

FOCUS

Estate & Tax Planning
Prenuptial, Postnuptial & Cohabitation Agreements
Administration of Trusts & Estates
Business Succession Planning
Fiduciary Litigation, Family Disputes & Will Contests
Planning & Trusts for Individuals with Special Needs
Planned Charitable Giving
Trusts, Estates & Personal Planning
Nonprofit & Religious Organizations

BAR ADMISSIONS

New Jersey
Pennsylvania

EDUCATION

LL.M. in Taxation, Villanova University School of Law
J.D., Rutgers University School of Law – Camden
B.S., Pennsylvania State University

MEMBERSHIPS

Board of Directors, Chamber of Commerce Southern New Jersey
Board of Directors, The Catholic Partnership Schools
Gift Planning Advisory Council, Pennsylvania State University
Executive Advisory Council, The Catholic Foundation of Greater Philadelphia
Professional Advisors Committee, The Community Foundation of Southern New Jersey
Philadelphia Estate Planning Council

- President, Board of Directors
- Former Vice President, Board of Directors
- Former Treasurer, Board of Directors
- Former Secretary, Board of Directors
- Co-chair, Women's Initiative Committee

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Stephanie E. Sanderson-Braem

Page 2

- closed one of the largest client estates, saving more than \$14 million in federal estate tax; the IRS gave the estate tax clearance without any adjustment to the federal estate tax return
- represented a residual beneficiary of an estate in the protection of estate assets and removal of an executor in Orphans' Court in Philadelphia County in a case involving a legal issue of first impression
- created tax planning strategies for individuals with wealth exceeding federal and state applicable exclusion amounts

SPEAKING ENGAGEMENTS

- Presenter, "Making a Will and Estate Planning Tips," Pennsylvania State University Office of Gift Planning
- Panelist, "Year-end Planning and Updates on Tax Legislation," Pennsylvania State University Gift Planning Advisory Council
- Panelist, "Advance Directives and Healthcare POA," Pennsylvania State University Gift Planning Advisory Council
- Panelist, "Avoiding the Many Pitfalls in Preparing Gift Tax Returns," Philadelphia Estate Planning Council
- Panelist, "Estate Planning Week: Advance Directives and More," Pennsylvania State University Gift Planning Advisory Council
- Presenter, "Supplemental Needs Trusts," Planning for Loved Ones with Special Needs Seminar
- Guest, "What Prince's Death Can Teach You About Estate Planning," Your Life, Your Wealth podcast presented by the Cordasco Financial Network
- Panelist, "Do Not Wait For a Leader...Look in the Mirror, It's YOU!" Healthcare Financial Management Association's Women in Leadership: Empowering Women to Lead
- Panelist, "The Next Generation: Preparing Our Future Leaders," United Way of Greater Philadelphia and Southern New Jersey Leaders Lead Speaker Series
- Presenter, "Getting More: How You Can Negotiate to Succeed in Work and Life," Group Hug - Wharton Professor Stuart Diamond
- Presenter, "Interacting with Our Clients through Technology in a World of Regulators and Scammers," Philadelphia Estate Planning Council

RECOGNITION

- *New Jersey Law Journal*, New Leaders of the Bar, a list of the "next wave of leadership of the New Jersey bar"
- *South Jersey Biz*, 20 Under 40, a list of the "young professionals doing big things in South Jersey"

MEMBERSHIPS

Board of Directors, Officer and Secretary of the Board, Knights Education Foundation

Former Vice President, Board of Trustees, Cherry Hill Public Library

Camden County Bar Association

Estate and Financial Planning Council of Southern New Jersey

Philadelphia Bar Association, Probate and Trust Law Section

Stradley Ronon Diversity Committee



Stephanie E. Sanderson-Braem

Page 3

IN THE COMMUNITY

Stephanie is active in the Greater Philadelphia region, serving as president of the Philadelphia Estate Planning Council, the board of directors of the Knights Education Foundation as Secretary and the Catholic Partnership Schools. She serves on the Gift Planning Advisory Council for Penn State University and on the finance committee for the Catholic Foundation of Greater Philadelphia.

Stephanie was previously appointed by the mayor of Cherry Hill, New Jersey, to serve on the board of trustees and to serve as the former vice president of the board of the Cherry Hill Public Library. She is a former member of Virtua Foundation's Gift Planning Advisory Council and a former member of the governance committee for Catholic Partnership Schools in Camden, New Jersey. She served on the Host Committee for Cooper Foundation's Pink Roses Teal Magnolias event from 2014-2017. Stephanie also served on the board of directors of the Philharmonic of Southern New Jersey from 2013-2015 and on the board of directors of the Covenant House from 2013-2018.

Stephanie is a graduate of LEADERSHIP Philadelphia's 2014 executive program and the Young Leader's Program of the United Way of Greater Philadelphia and Southern New Jersey.

