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# Stephen A. Brown

SHAREHOLDER

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Stephen Brown focuses his practice on business formation and structuring, wealth transfer planning, and litigation involving fiduciaries, trusts, estates and guardianships. He is a Board Certified Specialist in Estate Planning and Probate Law.

Stephen regularly advises individuals on a range of estate planning strategies, including the use of simple and complex trust arrangements to achieve their personal and charitable objectives in a tax advantaged manner. He also has extensive experience advising clients regarding estate, trust and guardianship matters, including will disputes, breach of fiduciary duty claims, marital rights in estate and trusts, irrevocable trust modification, asset protection, and incompetency proceedings.

Stephen also advises closely held businesses on a range of issues, including governance, mergers and acquisitions, buy-sell agreements, employment agreements and federal and state tax disputes.

Stephen graduated with honors from the University of North Carolina School of Law where he served as a staff member and published author of the North Carolina Journal of Law & Technology. He joined Young Moore and Henderson in 2011 after practicing with other area firms and was named a shareholder in 2014.



## Education & Bar Admissions

- J.D., University of North Carolina School of Law, 2008
- B.A., University of North Carolina at Greensboro, 2005

- B.M., University of North Carolina at Greensboro, 2005

#### Admitted in

- North Carolina, 2008
- U.S. Tax Court

### Focus Areas

- Business & Administrative Law
- Charitable Gift Planning & Tax-Exempt Organizations
- Estate Litigation & Fiduciary Dispute Resolution
- Real Estate
- Special Needs Planning & Guardianship
- Trusts, Estates & Wealth Preservation

### Achievements

- North Carolina State Bar Board Certified Specialist in Estate Planning and Probate Law, 2018
- Recipient of the J. Nelson Young Tax Scholarship at the University of North Carolina School of Law
- Recognized in *The Best Lawyers in America*® in Trusts and Estates (2019-2023)
- Listed in *North Carolina Super Lawyers*® as a “Rising Star,” (2018) a category for attorneys age 40 and younger
- Named in *Business North Carolina Legal Elite* in the area of Tax & Estate Planning (2019, 2021, 2023)

### Activities

- Wake County Bar Association
- North Carolina Bar Association Tax, Estate Planning and Probate law Section

### Publications & Presentations

- Co-Presenter, “*North Carolina State Law Developments*,” 43rd Annual Duke University Estate Planning Conference, October 2021
- “*Estate Planning Basics: What is Probate?*” Young Moore Blog, January 2021
- “*My Loved One Died. Does a Probate Estate Need to be Opened?*” Young Moore Blog, August 2020
- Co-Author, “*If Mom Could Only See Them Now! Navigating a Fiduciary Dispute*,” 40th Annual Estate Planning &

- Co-Author, “*Think You Have Timely Filed Your Client’s Elective Share Claim? Think Again*,” *The Will & The Way* Newsletter published by the Estate Planning & Fiduciary Law Section of the North Carolina Bar Association, February 2019
- “*Do I Have Any Rights Against My Spouse’s Estate When My Spouse Devises All Or A Portion Of Their Assets, Whether By Will Or Otherwise, To Someone Other Than Me At Their Death?*” Young Moore Blog, March 2017
- “*Can I Challenge a Will or Trust if I Believe the Document was Changed at a Time My Loved One Did Not Have the Capacity and/or the Ability to Resist the Influence of Others to Change the Will or Trust?*” Young Moore Blog, January 2017
- “*Do I Have Any Recourse Against an Agent Appointed Pursuant to a Power of Attorney Who I Believe is Taking Advantage of My Loved One?*” Young Moore Blog, January 2017
- “*How do I Recover Estate Property?*” Young Moore Blog, December 2016
- “*Estate, Trust, Fiduciary & Guardianship Litigation – Frequently Asked Questions*” Young Moore Blog, December 2016
- “*What Happens to Your digital Assets After Death?*” Young Moore Seminar, June 2016
- “*Probate, Taxes and Legacies, Oh My! Estate Planning 101 for Professionals*,” Young Moore Seminar, April 2016
- Panelist, “*Representing Clients with Diminished Capacity*,” 36th Annual North Carolina Estate Planning and Fiduciary Law Program, Kiawah Island, SC, August 2015
- “*Beware When Attempting to Devise Assets to Someone Other Than Your Spouse*,” Young Moore Blog, December 2013
- “*Illegal Immigrants in the Workplace: Why Electronic Verification Benefits Employers*” 8 N.C. J.L & Tech. 349 (2007)

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