Steven L. Hwang

ATTORNEY

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Steven L. Hwang works with business owners and executives, multi-generational families, real estate owners, and professional advisors including CPAs, financial planners and advisors, and insurance brokers. His practice focuses on estate planning and business planning. Steven's clientele reflects businesses of all sizes and across broad industry segments, as well as individuals and families.

Steven's knowledge and experience in estate planning, trust administration, business planning, and real estate combine to provide beneficial holistic synergy for firm clients. Thoughtful and detail oriented, clients also appreciate Steven's practical advice and cost-effective approach to customer service.

TRUSTS AND ESTATES PLANNING

A Masters of Laws (LL.M.) in Taxation degree and experience with a wide range of wealth and family situations — including second marriages, non-married couples, and gay couples — enable Steven's successful trusts and estates planning practice. For clients seeking to avoid probate and minimize tax impact, plan for incapacity and death, or preserve generational wealth, his deep knowledge of revocable living trusts, irrevocable life insurance trusts, and charitable trusts is invaluable. Steven works with high net worth individuals and families; business, home, and property owners; and young couples with children. Whether your goal is to minimize post-death fees or to facilitate business and property succession, asset protection, and wealth preservation, Steven and Finch, Thornton & Baird, LLP can help.

TRUSTS AND ESTATES ADMINISTRATION

The loss of a family member or friend is never easy. And in the absence of proper planning in advance of the event, those nominated as successor trustee(s) and/or executor(s) face additional challenges. Typically these involve family-related disputes or

PRACTICES

- Construction Law
  - *Real Estate*
  - *Corporate*
  - *Wealth Preservation*
- Wealth Preservation
- Business & Commercial Transactions
- Real Estate
- Corporate Formation, Governance & Compliance

ADMISSIONS

- California: State Courts
- U.S. District Courts of California

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conflicts between trustees and beneficiaries and/or the simple lack of knowledge regarding fiduciary duties and liabilities. Having encountered a wide variety of situations, clients rely on Steven's extensive knowledge of trust and probate accounting and experience with the San Diego Probate Court. His thoughtful ability to help resolve family disputes and expedite the administrative process has been demonstrated many times over. Steven has worked with trusts and estates with negative assets to those of over $50 million.

BUSINESS AND COMMERCIAL TRANSACTIONS

Steven brings a wealth of transactional expertise to the firm's diverse general business and commercial client mix. For fast moving start-ups, Steven delivers experience on new entity formation, negotiation, and documentation of essential business arrangements; as well as the ability to analyze, structure, and execute a wide array of transactions necessary to ensure business growth and success. Mature or more established companies rely on counsel regarding critical day-to-day legal decisions, maintenance of corporate books and records, employment and consulting agreements, and much more. Owners contemplating the sale or merger of their business, or even dissolution, can also count on Steven for legal counsel and prudent business advice. Whatever your needs throughout the entire business life cycle, we have you covered.

CORPORATE FORMATION, GOVERNANCE, AND COMPLIANCE

Ably guiding startups, small and mid-sized business owners, partners, and shareholders through their business and commercial transactional needs is another of Steven's core strengths. This includes all aspects of corporate formation, governance, compliance, CLSB licensing, and business succession planning and documentation. He also offers abundant expertise with buy-sell and shareholder agreements, as well as LLC operating agreements. For small, disadvantaged, and set-aside businesses, Steven can handle your SDVOSB, SBA 8(a), WOSB, and DBE qualification and compliance matters, too.

REAL ESTATE

Property and business owners readily value Steven's expansive knowledge of California Association of Realtors (CAR) and AIR CRE real estate agreements, as well as California property taxes and exemptions. He also represents clients regarding City and County of San Diego land use permits, lot line and boundary adjustments, mergers, and partitions issues. Whether your needs pertain to commercial leases or lease disputes, the purchase or sale of real property, or land use planning issues, Steven has all the experience you need to cost-effectively handle the preparation and/or review of your real estate agreements.

EXPERIENCE

- Estate planning, wills, and trusts
- Trusts and estates administration
- Business and commercial transactions
- Business entity formation and operation
- Works with clients, as well as their families and professional advisors, to determine the clients' estate and business planning objectives, related tax and non-tax issues, and devises and implements planning strategies which are tailored to achieve the clients' individual needs and objectives
- Counsels clients regarding the formation and operation of various business entities, including limited partnerships, limited liability companies, and corporations
- Land-use planning, including conditional use permits, partitions, and lot-line adjustments
- Real estate agreements, including leases, purchase and sale agreements, and tenants-in-common
- Licensing, including CSLB, SDVOSB, SBA 8(a), WOSB, and DBE

EDUCATION

- University of San Diego School of Law, LL.M., Taxation
- Pepperdine University School of Law, J.D.
  - *Editor-in-Chief, Pepperdine Dispute Resolution Law Journal*
- University of California, Santa Barbara, B.A., Business Economics with emphasis in Accounting

MEMBERSHIPS

- State Bar of California

Steven L. Hwang
ATTORNEY

EXPERIENCE (Con't)

- Tax, including income, estate, gift, and property
- Entity selection and formation
- Mergers and acquisitions
- Purchase and sale of businesses
- Wind up and dissolution of businesses
- Shareholder and partner agreements
- Corporate fovernance
- General business planning and advice
- Ownership succession
- Family owned/closely held businesses
- Buy-sell/shareholder agreements
- Stock option agreements
- Employment agreements
- Executive compensation arrangements
- Nondisclosure agreements
- Employee confidentiality and nondisclosure agreements
- Noncompete/nonsolicitation agreements
- Trademarks and intellectual property license agreements