Steven D. Baker

Curriculum Vitae

Steven D. Baker counsels individuals and fiduciaries in a wide variety of estate and business succession, charitable giving, and estate and trust administration matters.

With an eye toward minimizing the burdens of taxation and uncertainty, Steven designs and implements the vehicles most appropriate for meeting each client's unique needs (including wills, revocable trusts, irrevocable trusts for children and other family members, charitable trusts and foundations, business and investment entities, durable powers of attorney, and health care directives) and then assists each client with maintaining those structures. Steven also advises personal representatives, trustees, settlors, and beneficiaries regarding the efficient and effective administration of estates and trusts, including compliance with the myriad of tax and non-tax obligations and implementation of judicial and non-judicial modifications and settlements. Steven is a member of the bar in Arizona and Texas, Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization, and a licensed C.P.A.

Education

University of Texas School of Law (J.D., 1997)

University of Texas at Austin (B.B.A., Accounting with High Honors, 1993; M.P.A., Taxation, 1993)

Professional Affiliations and Honors

Board Certified, Estate Planning and Probate Law (Texas Board of Legal Specialization)

Certified Public Accountant (Texas State Board of Public Accountancy)

American Bar Association
- *Real Property, Trust and Estate Law Section*

College of the State Bar of Texas

State Bar of Texas
- *Real Estate, Probate and Trust Law Section*

State Bar of Arizona
- *Estate and Trust Committee of the Board of Legal Specialization, Member (2006-2009)/Chairperson (2008-2009)*
- *Fee Arbitration Committee, Member Arbitrator (2007-2008)*

Austin Bar Association
- *Estate Planning & Probate Section*

American Institute of Certified Public Accountants

Professional Publications (Selected)

"Rachel v. Reitz and the Efficacy and Implementation of Mandatory Arbitration Provisions in Trusts," Estate Planning & The Texas Tech University School of Law (Volume 9, Page 191; Spring 2017)

"The Texas Mess: Marital Property Characterization of Trust Income," Estate Planning & Community Property Law Journal, Texas Tech University School of Law (Volume 5, Page 217; Summer 2013)

“What You Need to Know About the Arizona Trust Code,” AZ CPA Magazine (October 2008)

Professional Presentations (Selected)

“Non-Probate Transfers of All Kinds,” 65th Annual Taxation Conference, University of Texas School of Law (Austin, Texas; December 2017)

“When to File an Estate Tax Return,” Texas Society of Certified Public Accountants (Austin, Texas; February 2016)

“What You Need to Know About Community Property,” Texas Society of Certified Public Accountants (Austin, Texas; October 2014)

“Income Taxation of Trusts and Estates in Texas,” Texas Society of Certified Public Accountants (Austin, Texas; November 2013)

“Estate Tax Compliance and Planning After December 31, 2012,” Texas Society of Certified Public Accountants (Austin, Texas; January 2013)

“Estate Planning Before January 1, 2013,” Texas Society of Certified Public Accountants (Austin, Texas; November 2012)

“Managing the Decisions in Post-Mortem Planning” and “Planning with Retirement Benefits,” Minimizing Client Estate Taxes with Plans That Work, National Business Institute (Phoenix, Arizona; November 2008)

“Estate Planning for Companion Animals,” Annual Conference of the State Bar of Arizona (Tucson, Arizona; February 2007)

“Estate Planning and Living Wills: Managing Your Future Today,” Maricopa County Bar Association Paralegals Division Annual Conference (Phoenix, Arizona; September 2005)

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