



## STEPHEN H. GARIEPY PARTNER



### Hahn Loeser & Parks LLP

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### PRIMARY PRACTICES

Business Law

Trusts & Estates

Middle Market

Fiduciary Litigation

Estate Planning

Stephen H. Gariepy is a partner and National Co-Chair of Hahn Loeser's Estate Planning, Wealth Transfer & Preservation Section.

Steve focuses his practice on leading-edge estate planning techniques. His ability to design creative and comprehensive plans – and make them practical and understandable – has attracted clients nationwide from the ranks of Forbes 400, business owners, families and nonprofit organizations.

Steve regularly counsels owners of privately held companies and guides business owners through options for succession planning, leveraged gifting, tax-free sales, valuation discounting, shifting voting control and equity among active and non-active heirs, split-dollar and other insurance plans, incentive compensation, buy-sell agreements, stock transfer restrictions, business reorganizations, buyouts, tender offers, asset protection (domestic and offshore), dynasty trusts, legacy trusts, family offices, charitable trusts, and foundations. He places an emphasis on minimizing income tax, gift tax, estate tax and generation-skipping tax.

Steve is often called upon to resolve the difficult issues that arise in the dynamic relationships among family members and business owners. He also assists executors and trustees in the often complex role of estate and trust administration.

In addition, Steve has served as a software consultant for *BNA Estate & Gift Tax Planner*, the gold standard in estate planning software produced by the Bureau of National Affairs Inc. Steve has received numerous awards for his efforts. These include being the first to receive The Best Lawyers in America Lawyer of the Year award for Cleveland Trusts and Estates. The selection was based on the highest peer ratings of other leading practitioners in his specialty for abilities, professionalism and integrity. His other awards include recognition in the The Best Lawyers in America for Closely Held Companies and Family Businesses Law, The Best Lawyers in America for Trusts and Estates, Ohio Super Lawyers for Estate Planning and Probate (Blue Ribbon Panelist), the Award of Merit from the Ohio Legal Center Institute, and the Distinguished Estate Planner of the Year Award from the Estate Planning Council of Cleveland. He is also AV<sup>®</sup> Preeminent Rated (the highest peer rankings for legal ability and ethics) by Martindale-Hubbell. In 2015, Steve was recognized by *Crain's Cleveland Business* as one of the "100 Most Connected" businesspeople in Northeast Ohio. Steve is also a Fellow of the American College of Trust and Estate Counsel, and has served as a faculty member at its conferences.

### BAR ADMISSIONS

- State of Ohio; State of Florida; State of Arizona
- U.S. District Court for the Northern District of Ohio; U.S. Tax Court

### EDUCATION

- The Ohio State University College of Law J.D., cum laude

- Case Western Reserve University B.A., magna cum laude

#### AWARDS & HONORS

- The Best Lawyers in America®, Closely Held Companies and Family Businesses Law, 2017-2026, Tax Law, 2023-26, Trusts and Estates, 2006-26, Litigation – Trusts and Estates, 2025-26; Cleveland Lawyer of the Year, Trusts and Estates, 2011; (first-ever Cleveland Lawyer of the Year)
- Distinguished Estate Planner of the Year, The Estate Planning Council of Cleveland
- The Award of Merit, The Ohio Legal Center Institute
- Ohio Super Lawyers®, 2004-2026
- Chambers and Partners HNW Guide, Private Wealth Law, 2018-24
- AV Preeminent®, Martindale-Hubbell
- OSBA Certified Specialist, Estate Planning, Trust & Probate Law
- “100 Most Connected” businesspeople in Northeast Ohio, Crain’s Cleveland Business

#### MEMBERSHIPS & AFFILIATIONS

- American College of Trust and Estate Counsel, Fellow; Faculty Member
- Estate Planning Council of Cleveland, Past President; Program Chair; Monthly Developments Reporter
- Cleveland Metropolitan Bar Association, Estate Planning Institute, Past Chair; Continuing Legal Education Committee; Faculty Member
- Cleveland-Marshall Law School/IRS Conference on Federal Wealth Transfer Taxation, Faculty Member
- Attorneys for Family Held Enterprises, Member and Faculty Member
- Family Firm Institute, Member
- National Business Institute, Faculty Member
- Ohio State Bar Association, Sections on Probate and Trust Law and Corporations
- The Florida Bar, Sections on Real Property, Probate and Trust Law and Tax Law
- Arizona Bar, Section on Probate and Trust Law

#### COMMUNITY INVOLVEMENT

- Great Lakes Theater, Trustee
- The Cleveland Museum of Art, Planned Giving Council, Chair, Executive Committee
- Piano Cleveland, presenter of the Cleveland International Piano Competition and Piano Festival, Board of Directors; Chair, Governance Committee; Executive Committee; Strategic Planning Committee
- The Cleveland Orchestra, Planned Giving Advisory Council
- Case Western Reserve University, Estate Planning Advisory Council, Founding Member
- The Holden Arboretum and Cleveland Botanical Garden, Member
- Rock & Roll Hall of Fame and Museum, Rock Advisors, Founding Member



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*STEPHEN H. GARIEPY*  
*PARTNER*

- City Mission, Planned Giving Advisory Council, Founding Member
- University Hospitals of Cleveland, Diamond Advisory Group, Chair
- Chamber Music Guild, Member
- The Sculpture Center, Founding Member, Board of Trustees