

Stephen N. Yungling
Of Counsel

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Education

Santa Clara University School of Law, J.D., Magna Cum Laude, 1998
California Polytechnic State University, B.A., Summa Cum Laude, 1994

Memberships

BAR ADMISSIONS
California

MEMBERSHIPS
State Bar of California
Santa Barbara County Bar Association

Steve joined Mullen & Henzell in May 2013 from The Northern Trust Company, where he was the Senior Legal Counsel for the Western Region. Prior to Northern Trust, he was an Estate Planning/Tax Partner with Fell, Marking, Abkin, Montgomery, LLP, focusing on complex estate planning for high-net-worth clients. Steve specializes in estate planning and trust and estate administration. His practice focuses on working with and advising clients on comprehensive estate plans. These include revocable living trusts, wills, powers of attorney and advance health care directives. The estate plan may also include irrevocable trusts such as life insurance trusts, grantor retained annuity trusts, charitable remainder trusts, and generation-skipping transfers. Focusing on high-net-worth individuals and families, Steve emphasizes business succession planning and formulating a plan that balances the benefits of tax savings with the needs of beneficiaries. Steve also works with private and professional fiduciaries and family members in trust administration, probate and conservatorships. Steve provides representation for beneficiaries and trustees of trusts in conjunction with their rights and responsibilities under the provisions of the trust and/or in resolving disputes between beneficiaries and trustees.

Community Involvement

American Inn of Court
Director of Planned Giving Music Academy of the West
Board Member of CALM (Child Abuse Listening and Mediation)

Practice Areas

- Estate Planning
- Integrated Wealth Transfer Planning
- Tax and Business Planning
- Charitable Gift Planning
- Post Death Administration
- Trust Administration