

Stephanie D. Lee


Shareholder

Location: Midland, Texas

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Stephanie is a shareholder practicing in the Firm's Estate Planning, Probate, and Trust and Litigation Sections. Licensed in Texas, she is admitted to practice before the United States District Courts for the Western and Northern Districts of Texas and the United States Fifth Circuit Court of Appeals. She is an active member in the Midland community, volunteering for church and other charitable activities, serving on non-profit boards, and speaking at a variety of continuing legal education events. She has also served as an adjunct professor at Midland College. She is also a member of the Litigation Section and the Oil, Gas & Energy Resources Law Section of the State Bar of Texas.

Recent representations of Stephanie's practice include:

- Successfully arguing before the Eleventh Court of Appeals for Texas, upholding the summary judgment dismissal of one of the "Big Four" U.S. banks against claims of fiduciary malfeasance by trust beneficiaries in multiple state and federal lawsuits.
- Representing a corporate fiduciary in a complex oil and gas litigation matter involving deed interpretation issues, successful at summary judgment level and currently on appeal before the Eleventh Court of Appeals.
- Representing several mineral and surface owners in counties across the state in efforts to clear and quiet title, as well as defend against adverse possession claims.

PRACTICE AREAS

Estate Planning

Stephanie devotes a significant portion of her practice to creating, implementing, and modifying estate plans that accomplish clients' key objectives and goals regarding the disposition of estates and assets or to address changes in family or financial situations. She implements plans designed to reduce or avoid estate, gift, and generation-skipping transfer taxes. She also advises clients concerning capacity planning, including Directives to Physicians (Living Wills), Medical Powers of Attorney, Statutory Durable Powers of Attorney, and Living Trusts.

Probate, Estate, and Trust Administration

Stephanie also devotes a significant portion of her practice to advising both fiduciaries and estate beneficiaries with regard to the probate of estates. She has advised surviving spouses and other beneficiaries regarding their statutory rights and fiduciaries regarding the disposition of estates in both contested and uncontested matters.

Litigation- Commercial, Oil and Gas, and Fiduciary

Stephanie began her career with the Firm in the Litigation Section and retains a specialized docket of cases, including: fiduciary litigation and various oil and gas matters. Stephanie has successfully represented clients in oil and gas matters involving: deed interpretation disputes; lease interpretation and lease termination disputes; joint operating agreements; royalty payment disputes; purchase and sale agreements; adverse possession; and title disputes.

Federal and State Appeals

Stephanie has briefed both state and federal appeals regarding claims of breaches of fiduciary duty, fraud, and self-dealing in the context of Estates and Trusts litigation. She has also successfully argued before the Eleventh Court of Appeals of Texas.

AREAS OF CONCENTRATION

- Estate Planning and Probate
- Family Wealth Transfers
- Asset Protection
- Incapacity Planning
- Probate, Estate, and Trust Administration
- Fiduciary Litigation

BAR ADMISSIONS

- Texas
- U.S. District Court Western District of Texas
- U.S. District Court Northern District of Texas
- U.S. Court of Appeals 5th Circuit

EDUCATION

The University of Texas School of Law, Austin, Texas

J.D. - 2011

Honors: Member - Phi Delta Phi

Abilene Christian University, Abilene, Texas

B.S. *cum laude* - 2003

Major: History and Political Science

COMMUNITY INVOLVEMENT

Stephanie is an active member of the Midland County Bar Association. She is also an active member at Golf Course Road Church of Christ. She currently serves as a Board Member for Midland Teen Court. She also helps coordinate "Secret Santas" for a local women's shelter. She is an avid supporter of Midland Christian School, where her husband, Jared, serves as Superintendent. She and Jared have two precious daughters, Avery and Payton, and two precocious beagles, Piper and Lucy.

PROFESSIONAL ASSOCIATIONS AND MEMBERSHIPS

Midland County Bar Association

Midland Odessa Business & Estate Council