



## Jeanette M. Lombardi

### Senior Counsel

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### Profile

**Jeanette concentrates her practice in estate and gift tax planning, and estate and trust administration. She works closely with individuals and families to implement strategies for wealth preservation, and wealth transfer, while minimizing tax consequences.**

Jeanette works in a team approach, including clients, accountants, financial planners and trustees to achieve the best strategy for the client.

### Practice Focus Areas

- Estate Planning Advice:
  - Establishing Florida Domicile
  - Family Wealth Preservation Planning
  - Revocable and Irrevocable Trusts, including Dynasty Trusts
  - Federal and State Gift and Estate Tax Reduction Planning
  - Integration of large IRAs and Qualified Plan Benefits into Estate Plans
  - Preparation and Negotiation of Prenuptial and Postnuptial Agreements
  - Business Succession Planning
- Estate Administration:
  - Trust Settlement
  - Probate

### Honors & Affiliations

- Supreme Court of Florida Circuit Court Mediator
- The Florida Bar, Real Property, Probate and Trust Law Section
- Collier County Bar Association, Trusts and Estates Section
  - Medal of Honor, Attorney of the Year Award, 2008
- Collier County Women's Bar Association
  - President, 1998-99; Board, 1996-2000
- Florida Association for Women Lawyers

### Education

- University of Miami School of Law (J.D., *cum laude*, 1993)
- Barry University (B.A., *magna cum laude*, 1989)

### Bar/Court Admissions

- U.S. District Court for the Southern District of Florida
- Florida
- U.S. District Court for the Middle District of Florida
- U.S. Court of Appeals for the Eleventh Circuit

### Practices

- Trust and Estate

- Lawyers of Distinction - Estate Planning, Wills and Trusts, 2016 and 2017
- Martindale-Hubbell Client Distinction Award, 2015
- Five Star Wealth Manager Award, 2011 and 2012

## Representative Presentations

- The SECURE Act: Legal Answers to Help you Field Client Questions, Financial Planning Association of Southwest Florida, March 11, 2020
- Disclaimer Planning, Probate and Pumpernickel Luncheon Continuing Education Form, October 15, 2019
- Panel Member, New Tax Law Changes for Businesses, Above Board Chamber of Florida, January 14, 2019
- Using Revocable Trusts, HalfMoon Education Inc., August 30, 2017
- Ethics and Client Representation, Divorce After Fifty, Sterling Education Services, Inc., Seminar, March 2009
- Understanding the Role of the Personal Representative in Probate, The Probate Process from Start to Finish, National Business Institute, December 2006 and December 2007
- Voices for Kids Interview, Television Appearance, D'Latinos TV Show, November 2006

## Representative Publications

- "Charitable Giving: make an impact in the community and save on your taxes!," *Professional Advisor Council Connector*, Community Foundation of Collier County, Summer 2017
- "Planning Ahead," *è Bella Magazine*, July 2008
- "Trust Essential in the Attorney-Client Relationship in Estate Planning," *Community Foundation Collier County Newsletter*, July 2007
- "Voices for Kids," *Adverse Witness*, April 2007
- "Yoga," *Adverse Witness*, December 2006

## Other Activities

- Conservancy of Southwest Florida, Member
- Lions Club, Naples, Member
- Community Foundation of Collier County, Past Member, Board of Trustees; Past Co-Chair, Professional Advisors Council; Past Secretary, Executive Committee
- Voices for Kids, SW FL: Past Member, Board of Directors