

Fisher Broyles

Name: Lisa Lipman

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Direct: +1.239.480.0420

Office: Naples

Practice Areas: Trust & Estates; Private Client Services

Bar Admissions: Florida; Massachusetts

Education: Boston College Law School, J.D., 2005; Northwestern University, M.S., 1995; Union College, B.A., 1993

Experience: Roetzel & Andress, LPA

Lisa focuses her practice on estate and tax planning, Florida domicile planning, estate administration, and trust administration for high-net-worth clients. She represents individual clients regarding all aspects of trust and estate administration, estate planning, and family wealth transfers. Her clients also include charitable organizations, national banks, and other corporate fiduciaries requiring representation in matters involving estates and trusts. She is experienced in the preparation of wills, the preparation and funding of revocable and irrevocable trusts, decanting irrevocable trusts, and the preparation of powers of attorney and other ancillary estate planning documents. Lisa drafts federal estate tax returns and estate planning documents and regularly handles complex trust administration and probate proceedings for highly complicated estates.

The Collier County Women's Bar Association named Lisa as the "Woman Lawyer of the Year" in 2024. She has been named as a Best Lawyers in America® for Trusts and Estates (2021-2026), Corporate Law (2022-2026) and Litigation - Trusts and Estates (2022-2026). She has also been selected by Naples Illustrated magazine as a "Top Lawyer" - Trusts and Estates (2020-2025) and was named a "Leader in the Law" by the Florida Association of Women Lawyers in 2020. She is a 2018 graduate of the Florida Fellows Institute of the American College of Trust and Estate Counsel (ACTEC) and was selected as a 2015 "Florida Rising Star" by Florida Super Lawyers magazine.

Lisa is a member of the Collier County Women's Bar Association, for which she served as President from 2017-2018 and was a member of the Executive Board from 2010-2019. She is also a member of the Estate Planning Council of Naples and the Collier County Bar Association. Lisa sits on the Board of

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Directors at Artis-Naples (2017-present) and served on the Naples International Film Festival Board of Directors from 2011-2016 and served as its President in 2012-2013.

Awards

- Best Lawyers in America® for Trusts and Estates (2021-2026), Corporate Law (2022-2026) and Litigation – Trusts and Estates (2022-2026)
- Naples Illustrated magazine as a “Top Lawyer” – Trusts and Estates (2020-2025)
- The Collier County Women’s Bar Association “Woman Lawyer of the Year” (2024)
- Florida Association of Women Lawyers “Leader in the Law” (2020)
- Florida Super Lawyers “Florida Rising Star” (2015)

Publications

- Bad Boy Clauses and the Good Charities that Use Them - Action Line, A Publication of the Florida Bar Real Property, Probate and Trust Law Section, Vol. XX (Summer 2021)
- Bad RAPutation: How The Rule Against Perpetuities Affects Non-Judicial Modification Of Trusts Under Fla. Stat. § 736.0412 - ActionLine, A Publication of the Florida Bar Real Property, Probate and Trust Law Section, Vol. XXXX (Spring 2019)
- Charitable Planning Under the New Tax Plan - ActionLine, A Publication of the Florida Bar Real Property, Probate and Trust Law Section, Vol. XXXI (Spring 2018)
- Joint Trusts - Too Much Togetherness? - Naples Daily News Special Section, Estate Planning Guide (2018)
- Uh Oh: When Non-Residents Who Own Homes in a Trust Become Florida Residents - Naples Daily News Special Section, Estate Planning Guide (2017)
- Celebrity Estate Planning Mistakes - and How to Avoid Them - Naples Daily News Special Section, Estate Planning Guide (2016)