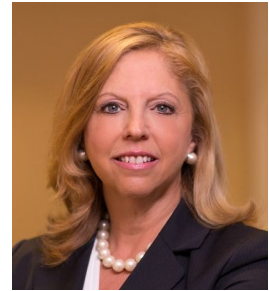


# Lisa A. Schneider

## Shareholder

West Palm Beach, Stuart  
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(561) 650-0680  
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## Practice & Industry Areas

- Private Wealth Services
- Family Office

## Education

- St. John's University, J.D., 1987
  - Dean's List, 1984-1987
- State University of New York at Binghamton, B.A., cum laude, 1984
  - Certificate in Business Management

## Bar & Court Admissions

- Florida, 1994
  - Board Certified, Wills, Trusts and Estates, 2003
- New York, 1988
- New Jersey, 1987
- United States District Court
- District of New Jersey, 1988
- Southern and Eastern Districts of New York, 1988

## Overview

Lisa A. Schneider leads Gunster's Trust & Estates practice, co-chaired the firm's Women's Leadership Forum, and co-chairs the firm's mentorship program. She focuses her practice on counseling families as to wealth preservation and transfer tax techniques, with a focus on planning for complex family structures and business succession.

Lisa devotes her expertise and proactive counseling to guide the firm's clients through complex transactions involving generations of families and succession planning for family businesses. Her extensive experience in representing wealthy individuals and their businesses includes representation of CEOs, business owners, multi-generational families, women professionals and business owners and young entrepreneurs. Lisa's responsiveness

to client needs and expertise in handling complicated situations has earned her respect by both clients and the legal community.

Lisa's dedication to her community is carried out by serving as a founding trustee of the Jewish Women's Foundation, as past chairperson of the Palm Beach Martin County Community Foundation Professional Advisory Committee, past co-chair of the Jewish Federation of Palm Beach County, Jewish Professionals Network and as past member of the Professional Advisory Group Steering Committee of Scripps Florida. Lisa is currently serving as a member of the Palm Beach Jewish Community Foundation Professional Advisory Committee.

Lisa was selected by the *Robb Report's WORTH Magazine* as one of the "Top 100 Attorneys" in the United States and has been ranked by Chambers High Net Worth Guide for private wealth law.

## Honors

- Chambers High Net Worth Guide, Private Wealth Law: Florida, 2016-23
- Certified as an Accredited Estate Planner® (AEP®) by the National Association of Estate Planners & Councils, 2014
- *The Best Lawyers in America*®, 2007-24
  - Trusts & Estates Litigation "Lawyer of the Year" in West Palm Beach, 2017, 2019
  - Trusts & Estates
  - Trusts & Estates Litigation
  - Tax Law
- Florida *Super Lawyers*, 2006-10, 2012-23
- *Boca Raton Observer*, "Top Lawyers," 2022
- *Stuart Magazine*, "Top Lawyers," Trusts and Estates, 2021, 2023
- *Palm Beach Illustrated*, "Top Lawyers," Tax Law, 2018-19, 2023
- *Chamber of the Palm Beaches'* Athena Leadership Award, Finalist, 2015
- AV Rated as independently determined by Martindale-Hubbell
- *Florida Trend*, "Legal Elite," 2004, 2012, 2022
- *South Florida Legal Guide*, "Top Lawyers," 2006-10
- *Cambridge Who's Who Registry Among Executive and Professional Women*, 2008-09
- *Who's Who of American Women*, 2008
- *Who's Who in America*, 2007
- *South Florida Business Journal's* "Key Partners Awards," Finalist, 2007-08
- *Robb Report's Worth Magazine*, "Top 100 Attorneys," 2005, 2007
- *South Florida Business Journal's* "Best of the Bar," 2003-04

## Publications & Presentations

- “Insights into planning for the new Florida client,” West Publishing’s Inside the Mind series, Strategies for Trusts and Estates in Florida, 2016-17 edition
- Lawyer of the Year profile, *Best Lawyers* magazine (South Florida edition), Fall 2016
- “Take Two: Estate Planning for Divorce and Remarriage” webinar, The American Law Institute, speaker, August 19, 2016
- “[You can have your cake and eat it too,](#)” Estate Planning Supplement, *Palm Beach Daily News*, January 2016
- “10 key strategies for women doing estate planning,” BizWomen, *The Business Journals*, June 2015
- “4 Important Estate Planning Tips for Women,” American City Business Journals, December 12, 2014
- “Lean-In: 5 Planning Tips for the Successful Woman Entrepreneur,” Palm Beach Society Magazine, November 14-20, 2014
- “Til Death Do Us Part — Or At Least Until The Ink Is Dry; Estate Planning For Second And Later Marriages,” 2013 Trust and Estate Symposium, October 2013
- “Let the Sunshine In: Recent Changes to Florida Homestead and Post-Death Challenges to Spousal Rights,” New York State Bar Association, panelist, April 2011
- “Tax Planning in Times of Uncertainty: Estate, Gift and GST Tax Issues for 2010 and Beyond,” The Planned Giving Council of Palm Beach County, speaker, May 11, 2010
- Estate and Trust Administration Paralegal Association of Florida, Inc. 2009 Spring Seminar, May 2009
- “Disclaimers at the 25th Annual Estate and Probate Seminar,” Palm Beach County Bar Association, May 14, 2008
- “A Trustee’s Job is Never Done,” Treasure Coast Chapter of the Paralegal Association of Florida, Spring Seminar, April 2008
- “New Disclaimer Statute,” Probate & Pumpnickel CLE, November 2005
- “IRAs and the Elective Share,” Palm Beach Estate Planning Council Roundtable, March 2005
- “Wealth & Wisdom,” WXEL, The Decoupling of State Estate Taxes, August 2004
- “Old Bags: The Power of the Purse,” The Bank of New York, February 2004
- “Wealth and Wisdom,” WXEL, November, 2003
- “Maybe You Can Have It All,” Florida Association of Women Lawyers, Palm Beach County Chapter, April 2002
- “Estate Planning After The Economic Growth and Tax Relief Reconciliation Act of 2001,” Florida Society of Ophthalmologists, September 2001
- “Women In The Know, Planning Beyond Your Will,” AAUW, February 2000
- “Estate Planning: A Woman’s Perspective,” American Heart Association, February 1997
- “Critical Estate Planning Issues: The Private Agenda For Today’s Woman,” presented with U.S. Trust Company of Florida, January 1995
- “The Benefits of Estate Planning,” presented with The Citicorp Private Bank, December 1995

- “Estate and Creditor Protection Planning for the Successful Professional,” presented by Gunster, Yoakley, Valdes-Fauli & Stewart, P.A. and Integrated Planning Services, September 1994
- “A Rude Awakening,” *Wealth Management.com*, February 20, 2014
- “Your Durable Power of Attorney May Be ‘Valid’ – But Is It Effective?,” *Palm Beach Daily News*, January 2012
- “Florida’s New Power of Attorney Act: Significant Departure From Tradition,” *New York Law Journal*, January 2012
- Quoted in “Capital Sources: Estate Tax Scenario has Firms, Clients Wondering,” *The Daily Business Review*, December 2010
- “Leaving New York Tax ‘Potholes’ and Avoiding Florida Homestead ‘Sinkholes,’” *New York Law Journal*, January 2010
- “Two Halves Do Not Necessarily Make a Whole,” *Palm Beach Daily News*, co-author, January 2007
- “Through the Looking Glass: Does Your Estate Plan Work?” *Palm Beach Daily News*, co-author, January 2006
- “A Move to the Sunshine State: Leaving the Cold and Taxes Behind,” co-author, *Palm Beach Daily News*, January 9, 2005
- Quoted in “Prenuptial Agreements, the Increasingly Common Consideration for Couples Today,” *Vive Magazine*, August 2004, by Judy Martel
- “My Brother’s Keeper,” *Palm Beach Daily News*, January 2004
- “Can Front Loading in a 529 Plan Backfire?” *Palm Beach Daily News*, January 2003
- “New IRS Proposed IRA Regulations,” *Palm Beach Daily News*, January 2002
- “In My Grandchildren I Trust,” *Palm Beach Post*, January 2001
- “Florida’s Elective Share Law — It Can’t Be Avoided Anymore!” *Palm Beach Post*, December, 1999
- “Medicaid Planning Ideas — What Works and What Doesn’t,” *Estate Planning*, contributing author, November/December 1993
- “Planning for the Elderly or Incapacitated Client,” Sanford J. Schlesinger and Barbara J. Scheiner, researcher and contributing draftsman, CCH 1993

## Professional Associations & Memberships

- New Jersey Bar Association
- American Bar Association
- New York Bar Association
- Florida Bar Association
- National Association of Estate Planners & Councils
- Palm Beach County Estate Planning Council
- Martin County Estate Planning Council
- Treasure Coast Planned Giving Council

- East Coast Estate Planning Council
- Foundation of the Jewish Federation of Palm Beach County, Professional Advisory Committee
- Palm Beach County Bar Association
- Martin County Bar Association, Elder Law/Probate/Guardianship Committee
- United Way of Martin County Foundation, Professional Advisory Committee, 2003-04
- Scripps Professional Advisory Group Steering Committee

## **Civic & Community Service**

- Scripps Florida, Professional Advisory Board
- The Jewish Federation of Palm Beach County
  - Jewish Professionals Network, Co-Chair
  - Jewish Community Foundation Professional Advisory Board
- Herizon (formerly Jewish Women's Foundation)
  - Founding Trustee
  - 20 Years of Transformation Annual Campaign, Chair
- American Heart Association, Martin County Division, Advisory board, former Member
- American Heart Association, Planned Giving Committee, former Chair
- Arthritis Foundation
- Adopt-A-Family, Advisory Board
- Alpert Family & Children's Services, Advisory Board
- Community Foundation for Palm Beach & Martin Counties, Philanthropic Advisory Council