



Partner

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Industries

Family Office

Practices

Trusts & Estates
Tax
Employee Benefits

Education

Certificate, Employee Benefits, Temple University School of Law, 2002
LL.M., Taxation, Temple University School of Law, 2001
J.D., Temple University School of Law, 2000
B.A., *magna cum laude*, East Asian Studies, Japanese, Bryn Mawr College, *departmental honors*, 1997

Bar Admissions

Pennsylvania, 2000
New Jersey, 2000
District of Columbia, 2004

Lisa Lassoff Nentwig focuses her practice on estate planning, estate administration and general taxation in Pennsylvania and New Jersey. Her goal is to create estate planning documents, such as Living Wills, Powers of Attorney, Wills and Trusts, which are carefully tailored to meet her clients' unique individual needs and accomplish their objectives. She has designed and coordinated multi-jurisdictional estate plans and has handled various issues associated with the aging, the disabled, the incapacitated and the very young.

Representative Experience

- Administered the Trust of one of America's most renowned female philanthropists.
- Counsel executors and trustees in the audit of death tax returns and successfully resolve audits, saving one trust \$1 Million.
- Drafted a genetic testing agreement to confirm an individual's paternity for inheritance purposes.
- Prepared an inheritance tax appeal for a surviving life partner under PA case law holding DOMA unconstitutional.
- Handled a complex estate administration involving PA, NY and Canadian real estate, a timeshare interest, gas well interests and five (5) closely held business interests.
- Prepare Wills containing various unique trusts, including trusts for minor children, special needs trusts for disabled beneficiaries and trusts to defer income taxes on retirement assets.
- Modernize trusts under the PA Uniform Trust Act.
- Handle \$200M - \$300M trust divisions.
- Draft Prenuptial and Postnuptial Agreements tailored to clients' estate plans.
- Review IRA / 401(k) beneficiary designations for proper tax planning under the Secure Act.
- Prepare and file Pennsylvania Inheritance Tax Returns and Inventories, New Jersey Inheritance Tax Returns, Federal Estate Tax Returns, Gift Tax Returns, and Federal and State

Income Tax Returns for estates and trusts.

- Successfully represent beneficiaries in family settlement agreements and proposed distributions of estates and trusts.

Professional and Community Activities

- President and Member, LeTip of Philadelphia Metro Chapter, April 2012 – April 2014
- Secretary and Member, LeTip of Philadelphia Metro Chapter, 2007 - 2011, 2015 – Present
- Member, American Bar Association, 2000 – Present
- Member Pennsylvania Bar Association, 2000 – Present
- Member, Philadelphia Estate Planning Council, 2000 – Present
- Certified spinning instructor

Speeches and Presentations

- Presented “Maintaining and Updating Estate Plans for the Evolving Client” at LeTip of Philadelphia Metro Chapter (2016).
- Presented “Why Have a Will, Living Will and Durable General Power of Attorney?” at LeTip of Philadelphia Metro Chapter (2015).
- Author of: "Is This the End of Williamson?" (*Probate & Trust Law Section Newsletter* - May 2012).
- Presented "Joint Tenancy with the Right of Survivorship," in November 2010 at the Pennsylvania Bar Institute.
- Participant in the June 2008 Dunwoody Village Wellness and Health Fair in Newtown Square, PA.

Professional Recognition

- Named Rising Star in *Philadelphia Magazine* (2008).