

## PARTNER

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### LISA NEWFIELD

Lisa Newfield represents individuals and families with sophisticated estate planning, trust and estate administration, tax planning, family business succession planning, and charitable giving. Lisa also advises non-profit institutions' development and planned giving departments.

Lisa currently serves as co-Chair of the Probate Section of the Fairfield County Bar Association and as co-Chair of the Planned Giving Committee of the Trusts and Estates Section of the New York State Bar Association. Lisa is also on the Board of the Philanthropic Planning Group of Greater New York.

Lisa is a noted lecturer on charitable giving and various trusts and estates topics. She has spoken before the New York State Bar Association, the Westchester County Bar Association, the Westchester Women's Bar Association, educational institutions, and non-profit institutions. She has contributed to Tax Planning Tips for Professional Advisors, the newsletter of the United Jewish Appeal-Federation of Jewish Philanthropies of New York. Lisa has also appeared on Westchester County's local cable show "Financial Planning with Legal Ease."

#### Areas of Experience:

- Sophisticated Estate and Tax planning
- Estate, Gift and Fiduciary Taxation, including representing fiduciaries in estate tax audits
- Estate and Trust Administration
- Charitable Planned Giving
- Representation of Exempt Organizations from Private Foundations to Public Charities with regards to obtaining and maintaining exempt status, major gift planning, and obtaining state approvals for gift annuity programs
- Asset Protection Planning
- Elder Law Planning

#### Memberships:

- Chair, Committee on Charitable Organization, Trusts & Estates Law Section of New York State Bar Association
- Member, Trusts and Estates Law Section of the New York State Bar Association
- Member, Elder Law Section of New York State Bar Association
- Member, Murtha Cullina Diversity and Inclusion Committee

#### Community Activities

- Member, Ambassadors Committee of The Community Foundation for Greater New Haven
- Member, American Cancer Society Planned Giving Advisory Council
- Member, Board of Directors, Philanthropic Planning Group of Greater New York
- Member, Yeshiva University Planned Giving Advisory Council



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#### BAR & COURT ADMISSIONS

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Connecticut

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New York

#### EDUCATION

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University of Michigan, J.D., 1995

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George Washington University,  
B.A., Political Science, 1992

#### PRACTICES & INDUSTRIES

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Non-Profit

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Trusts and Estates

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Tax

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Tax Practice and Procedure

*With more than 100 attorneys in six offices throughout Connecticut, Massachusetts and New York, Murtha Cullina LLP offers a full range of legal services to meet the local, regional and national needs of our clients. Our practice encompasses litigation, regulatory and transactional representation of businesses, governmental units, non-profit organizations and individuals.*



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