MOSES & SINGER LLP



Practice Areas

- · Trusts and Estates
- Litigation
- Matrimonial and Family Law

Lori Anne Douglass

Partner

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Lori Anne Douglass, a partner in the firm's Trusts and Estates Group, joined the firm in 2007. Lori's experience consists of estate and business succession planning, including the transfer of family-owned businesses, the establishment of private and public foundations and strategic planning to assist clients in maximizing wealth preservation. She is also a member the firm's Matrimonial and Family Law Group representing clients in family-related matters such as divorce and guardianship proceedings in Supreme Court.

In estate administration, Lori handles both contested and uncontested estate matters. Her practice includes the representation of estates, beneficiaries and heirs through probate and administration proceedings before the Surrogate's Court and the preparation of accountings and tax returns. In her role as corporate counsel, Lori oversees all legal matters for mid-size corporations, not-for-profit foundations and family-owned businesses. She also has extensive experience in residential and commercial real estate transactions.

A former New York County Assistant District Attorney, Lori possesses considerable litigation experience in both Supreme and Surrogate's Court. She has written extensively in her area of practice, is frequently interviewed for articles on estate and business planning, and is a well-known lecturer at national conferences and continuing legal education seminars. In 2009, she was a featured guest on <u>Black Enterprise Business Report</u> on their series concerning women and wealth.

Ms. Douglass is a member of the New York and Connecticut Bars.

EDUCATION

- · Syracuse University College of Law, J.D., cum laude
- · Swarthmore College, B.A.

LAW SCHOOL ACTIVITIES/HONORS

- · Syracuse Law Review, Executive Editor and Survey Editor
- Dean's List
- · Justinian Honor Society
- · Graduate Scholarship Award
- · Robert M. Anderson Publication Award
- Onondaga County Bar Association Award
- Author, "The Prosecution of Pornographers Under Prostitution Statutes-A New Approach," 37 Syracuse Law Review 977 (1986) (Selected for inclusion in U.S. Department of Justice Databank).

ARTICLES

• "Estate Planning Checklist," Moses & Singer Update, April 2012.

- "Everything You Wanted to Know About Your Finances But Were Too Afraid to Ask," interview, Black Enterprise, April 2012.
- "Get Excited About Your Money," quote, Black Enterprise, April 2012.
- "Protecting Your Assets," quote, Black Enterprise, April 2012.
- "<u>Deadline Approaching for Estate Tax Savings,"</u> Moses & Singer Wealth Preservation Advisor, March 2012.
- "The Team You Need for Your YEAR-END Financial Checkup," quote, Black Enterprise, December 2011.
- "Wealth Preservation Advisor: An Estate Planning Update," Moses & Singer Newsletter, July 2011.
- "Playing Catch-Up," quote, Black Enterprise, May 2011.
- "Why You Need to Review Your Estate Plan Now," Moses & Singer Client Alert, February 2011.
- "3 Things You Should Do Before Marriage," Moses & Singer Matrimonial and Family Law Update, February 2011.
- "Malcolm X Trove Hidden During Feud," quote, New York Times, February 2011.
- "Year-End Financial Checkup," quote, Black Enterprise, December 2010.
- "To Save and Protect," interview, Black Enterprise, April 2010.
- "Planning for the End," interview, Black Enterprise, July 2009.
- "A Woman's Guide to Wealth Preservation," interview, Black Enterprise, April 2009.
- "Wealth Preservation Advisor: An Estate Planning Update," Moses & Singer Newsletter, September 2008.
- "Profiles in Wealth Management: A Q&A with Some of the Industry's Leaders," interview, Northeast Wealth Management Business, February 2008.
- "Lawyer Fulfills Key Need," interview, The Journal News, December 2007.
- "Exit Gracefully, Estate Planning Guide," quote, Black Enterprise, June 2006.
- "When Death Comes Stealing," quote, Heart & Soul, May 2003.
- "Playing The Inheritance Shell Game," Black Enterprise, January 1997.
- "What's Your Problem (Q & A Re: Employee Associations)," Black Enterprise, November 1995.

PRESENTATIONS

- "Power of the Purse Pt. II: Retirement & Estate Planning," Black Enterprise Women of Power Summit, February 2012
- "Same Sex Marriage," Neighborhood Law Center TV, October 2011
- "Legal Services of the Hudson Valley Networking Event", host, October 2011
- "Divorce and Collaborative Law: An Alternative to Litigation," Moses & Singer LLP Webinar, February 2011
- "Relationships Pt. II: Love & Money," 6th Annual Black Enterprise Women of Power Summit, February 2011
- "Transferring Wealth to Future Generations," NAACP Women's Economic Empowerment Summit, October 2010
- "Becoming a Trusts and Estates Attorney," New York County Surrogate's Court, April 2010
- "Recession-Proof Practice Areas: A Program for Law Students and Recent Law School Graduates," The New York City Bar Association, March 2010
- "Estate Planning," coordinated by Monroe College School of Criminal Justice and New York County Surrogate Honorable Troy K. Webber, February 2010

- "Yes You Can (Manage More with Less)!", 5th Annual Black Enterprise Women of Power Summit, February 2010
- "<u>Estate Planning</u>," NorthStar News, Keeping It Rich with Sakina Spruell, October 2009
- "Planning for Life, a Good Death, and Surrogate's Court Litigation," coordinated by the Metropolitan Black Bar Association Inc.; The Lesbian, Gay, Bisexual and Transgender Law Association of Greater New York (LeGal); and Kings County Surrogate Diana Johnson's Law Department, October 2009
- "Love and Marriage, Divorce and Baggage," Moses & Singer Women's Initiative Program, June and September 2009
- "Wealthy Woman," BlogTalkRadio.com, July 2009
- "Money Madness," BlogTalkRadio.com, June 2009
- "Estate Planning," Bronx Bethany Church of the Nazarene, 2009 Financial Empowerment and Stewardship Conference, February 2009
- "Women and Money: Retirement and Estate Planning," 4th Annual Black Enterprise Women of Power Summit, February 2009
- "Women and Money Now," New York's Women Agenda, November 2008
- "Business Succession Planning: Minimizing Family Disputes," National Funeral Directors and Morticians Association, Inc. 71st Annual National Convention & Exposition, August 2008
- "Financial Fortitude," Bedford Stuyvesant Restoration Corporation, Financial Education Workshop Series, March 2008
- "Leaving A Financial Legacy," 3rd Annual Black Enterprise Women of Power Summit, February 2008
- "Trust Administration in New York," Lorman Education Services, September 2005
- "When Estate Planning Becomes Medicaid Planning," UJA-Federation 15th Annual Estate, Tax & Financial Planning Conference, May 2005
- "Succession Planning," National Association of Women Business Owners (NAWBO)/AXA Advisors, LLC Conference, March 2005
- "Basic Drafting: What You Need to Know to Get Started," New York State Bar Association, September 2004
- "Estate Planning," The Links 2004 National Assembly, July 2004
- "Estate Planning," Black Enterprise/Microsoft Entrepreneurs Conference, May 2003
- "Estate Planning," Black Enterprise/Bank of America Entrepreneurs Conference, May 2002
- "Avoiding Calamity, Chaos and Embarrassment with Proper Planning Strategies,"
 Black Enterprise/AXA Advisors Ski Challenge, January 2001

PROFESSIONAL AFFILIATIONS

- Co-Chair, New York State Bar Association, Trusts and Estates Section, Diversity Committee
- · Member, New York State Bar Association
- · Member, American Bar Association
- · Director, Michael J. Berkeley Foundation

BAR/COURT ADMISSIONS

- New York
- Connecticut

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