



## **BONIE S. MONTALVO JOINS CUMMINGS & LOCKWOOD'S PRIVATE CLIENTS PRACTICE IN BONITA SPRINGS OFFICE**

Cummings & Lockwood is pleased to announce that Bonie S. Montalvo has joined the firm as an Associate in the Private Clients Group based in its Bonita Springs office.

"We are very excited to have Bonie join our team of trusts and estates attorneys in our Florida and Connecticut offices," noted Jonathan B. Mills, Chairman and Managing Director. "She has excellent experience and credentials and will be a real asset to our firm, to our clients and to our community."

Bonie focuses her legal practice in the areas of estate planning, business succession planning, tax planning and nonprofit law. She works with individual and corporate clients to understand their estate planning goals and devises tailored plans to help her clients meet those goals while maximizing their tax advantage.

Bonie drafts wills, trusts and other estate planning documents, and assists with probate administration in several Southwest Florida counties. She also has experience assisting clients with business entity formation, including corporate, non-corporate and nonprofit.

Bonie often advises her clients on FIRPTA filings and tax controversy issues related to trust and estate matters. Proficient in Spanish, Bonie meets with both English and Spanish speaking clients to counsel them through various matters relating to estate planning, probate, and estate and trust administration.

Prior to joining Cummings & Lockwood, Bonie worked as an Associate at Hahn Loeser & Parks LLP in Naples, Florida and for Wood, Buckel & Carmichael in Naples, Florida. She also worked as a Summer Clerk for Goodman Breen & Gibbs in Naples, Florida, as well as for the Florida 20th Judicial Circuit in Fort Myers, Florida.

Bonie frequently writes on various trust and estate topics, including gift planning, tax planning, wills, and the impact of digital assets on estate planning.

She received her J.D., cum laude, in 2017 and LL.M. in Taxation, cum laude, in 2017 from the University of Florida Levin College of Law. She received her B.A., in Political Science and B.S. in Legal Studies from Florida Gulf Coast University, graduating magna cum laude in 2013.