



## BONIE S. MONTALVO

### Background

Bonie S. Montalvo is a Principal in Cummings & Lockwood's Private Clients Group and is based in the Bonita Springs office. Bonie focuses her practice on estate planning, tax planning and estate and trust administration.

Bonie guides clients throughout the estate planning process and works closely with them to create comprehensive estate plans tailored to meet their personal objectives in a tax efficient manner. Bonie drafts sophisticated estate plans for her clients, including, but not limited to, Revocable Trusts, Last Will and Testaments, Powers of Attorney, Advance Medical Directives, Living Wills and various types of Irrevocable Trusts. She also advises clients on a variety of trust and estate matters, including estate and gift tax planning, generational estate planning, planning for blended families, trustee requirements and beneficiary rights.

Bonie also works closely with clients in the estate administration process. She continuously represents clients in these matters and guides them in all aspects of Florida's probate and trust administration process.

Proficient in Spanish, Bonie meets with both English and Spanish speaking clients to counsel them through various matters relating to estate planning and estate and trust administration.

### Practice Areas

- Private Clients Group
- Wills, Trusts and Estate Planning

### Education

- University of Florida, Levin College of Law (LL.M. in Taxation, *cum laude*, 2017)
- University of Florida, Levin College of Law (J.D., *cum laude*, 2016)
- Florida Gulf Coast University (B.A in Political Science and B.S. in Legal Studies, *magna cum laude*, 2013)

### Bar Admissions

- Florida, 2016

### Languages



**Bonie S. Montalvo**

Principal

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# CUMMINGS & LOCKWOOD LLC

- Spanish

## Professional Organizations

- Florida Bar Association, Member
- Collier County Bar Association, Trusts & Estates Section, Young Lawyers Section, Member
- Collier County Women's Bar Association, Member
- Florida Gulf Coast University Alumni Association, Board Member

## Professional Recognition

- Florida Super Lawyers, Rising Star, 2022 - Present
- The Best Lawyers in America, "Ones to Watch", 2021 - Present

## Civic and Philanthropic Activity

- New Horizons of Southwest Florida, Board Member, 2019 - Present
- Collier County Legal Aid, Legal Aid Attorney of the Month, March 2018
- CCBA Young Lawyers, Member