



CUMMINGS & LOCKWOOD WELCOMES TWO NEW PRINCIPALS TO ITS PRIVATE CLIENTS PRACTICE

July 5, 2022

Cummings & Lockwood is pleased to announce that Joanne Butler and Lori E. Romano, two former partners at Shipman & Goodwin LLP, have recently joined the Firm as Principals in the Private Clients Group.

“We are very excited to have such seasoned estate planning practitioners join our premier trusts and estates practice,” said Heather J. Rhoades, Chairman of the Private Clients Group. “They will be a valuable addition to our team of highly respected private clients attorneys and fiduciary accountants who serve high net worth individuals, families, family offices and closely held businesses in Connecticut and Florida.” Laura Beck, the Firm’s Chairman and Managing Director, added that “Joanne and Lori will bring further bench strength and growth to Cummings & Lockwood’s private clients practice, which has been recognized by Chambers High Net Worth Guide as a leading Tier 1 practice in Connecticut.”

Joanne Butler, who is based in the Stamford, Connecticut office, has 23 years of experience developing estate planning strategies for individuals and families, as well as representing individual and corporate fiduciaries in all aspects of estate and trust administration.

Joanne advises clients with respect to the administration of estate and trust assets; the tax implications of complex estate, gift and generation-skipping transfer tax planning; and with the preparation and filing of estate and gift tax returns, estate accountings and periodic trust accountings.

She has represented both individual and corporate fiduciaries before the Internal Revenue Service, the New York County Surrogate’s Court and in Fairfield County, Connecticut Probate Courts.

Joanne received her LL.M. from New York University School of Law, her J.D., magna cum laude, from Brooklyn Law School and her B.S. from Seton Hall University. She is admitted to practice law in Connecticut and New York.

She is a member of the Connecticut Bar Association, Greenwich Bar Association, New York State Bar Association and New York City Bar Association.

Lori E. Romano, who is based in the Greenwich, Connecticut office, has 30 years of experience practicing in the areas of estate planning and estate and trust administration. Whether assisting clients with the simplest or the most sophisticated matters, Lori combines her estate planning knowledge and counseling skills to create wills, establish trusts and charitable giving vehicles, and develop wealth planning and succession strategies.

Lori practices before Probate Courts throughout Connecticut, and especially in Fairfield County, as well as prepares and advises those preparing estate and gift tax returns and fiduciary income tax returns.

She represents a wide variety of clients, including professional and corporate fiduciaries, business owners, executives of public and private companies, professionals, retirees, philanthropists, private investors, and

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individuals and families across multiple generations.

Lori received her J.D., magna cum laude, from the University of Bridgeport School of Law and her B.A., magna cum laude, from Fairfield University. She is admitted to practice law in Connecticut and New York.

She is a member of the American Bar Association, New York Bar Association, Connecticut Bar Association, Fairfield County Bar Association and the Greenwich Bar Association where she served as President and on the Executive Committee. She is also a member of the Estate Planning Council of Lower Fairfield County.