CUMMINGS & LOCKWOOD LLC

ROBERT L. LANCASTER

Background

Robert L. Lancaster is a Principal in Cummings & Lockwood's Private Clients Group and Principal-in-Charge of the Naples office. Rob focuses his practice on the areas of wealth preservation planning, estate planning and business succession planning. Today's litigious environment compels individuals to proactively engage in strategies to preserve their wealth.

Just as physicians are all too familiar with the inherent risks of practicing medicine, so too should entrepreneurs, executives and other professionals be aware of the risks associated with commercial enterprises.

Rob helps clients with wealth preservation planning, which involves maximizing the benefits offered under Florida law, as well as considering the implementation of sophisticated foreign or domestic structures.

Practice Areas

- Private Clients Group
- Wills, Trusts and Estate Planning
- Probate and Estate Administration
- Fiduciary and Trustee Services
- Wealth Protection Planning
- Philanthropic Giving
- Estate Planning for Corporate Executives
- Family Office and Closely Held Business Group
- Fiduciary and Probate Litigation Group
- Trusts and Estates Litigation
- Trusts and Estates Litigation

Education

- University of Florida, Levin College of Law (LL.M. in Taxation, 2001)
- University of Florida, Levin College of Law (J.D., *with honors*, 2000)
- Florida State University (B.S. in Business Management, *cum laude*, 1996)

Bar Admissions

Robert L. Lancaster

Principal

Collier Place II
3001 Tamiami Trail North
Suite 400
Naples, FL 34103

T 239.649.3178
F 239.430.3555

rlancaster@cl-law.com

- Florida, 2001

Professional Organizations

- Florida Bar Association, Real Property, Probate & Trust Law ("RPPTL") Section, Member
  - Executive Council, Member
  - Estate & Trust Tax Planning Committee, Past Chair
  - Asset Protection Committee, Member
  - Probate Law & Procedure Committee, Member
  - Probate & Trust Litigation Committee, Member
  - Trust Law, Member
  - Ad Hoc Study Committee on Spendthrift Trusts Issues, Member
- Collier County Bar Association, Trusts & Estates Section, Past Chair
- Twentieth Circuit Grievance Committee B, Past Chair

Professional Recognition

- Board Certified by the Florida Bar in Wills, Trusts and Estates
- The American College of Trusts and Estate Counsel (ACTEC), Fellow
- The Best Lawyers in America, 2018 - Present
- The Best Lawyers in America, "Lawyer of the Year" in Trusts & Estates Law, 2022
- Florida Super Lawyers, 2017 - Present, Rising Star, 2009 - 2014

Civic and Philanthropic Activity

- The Golisano Children's Museum of Naples, Board Member
- Pelican Bay Rotary, Member
- Baby Basics of Collier County, Inc., Founding Member, Former Board Member
- New Horizons of Southwest Florida, Former Board Member
- Collier County Bar Foundation, Director
- Estate Planning Council of Naples, Member
  - Annual Estate Planning Supplement in the Naples Daily News, Editor, 2008 - 2015

Articles/Publications

- Tenancy by the Entireties in Personal Property: Making the Case for Eliminating the Unities of Time and Title, ACTEC 2021 Florida Fellows Annual Meeting, co-author, July 2021
- Relationship Dissolution Planning - Asset Protection in Florida, co-author (3rd - 7th Editions)
- Ancillary Probate in Florida, Practical Law Guide, co-author, Thomson Reuters
- Probate: Florida, Practical Law Guide, co-author, Thomson Reuters
- "A Memo to the States - The UVTA Is Flawed...So Fix It!!!," co-author, Steve Leimberg's Asset Protection Newsletter #367, May 2018
- "History Has Its Eyes on UVTA," Steve Leimberg's Asset Protection Newsletter #320, April 2016
- "New Uniform Voidable Transactions Act: Good for the Creditors' Bar, But Bad for the Estate Planning Bar? - Part Two," Steve Leimberg's Asset Protection Newsletter #317, March 2016

- “Uniform Voidable Transactions Act and its Effect on the Estate Planning Community,” Steve Leimberg's Asset Protection Newsletter #316, March 2016
- "13 and Counting! Virginia Enacts Asset Protection Trust Legislation," co-author, Steve Leimberg's Asset Protection Planning Newsletter #197, April 2012
- "Miller v. Kresser: Lessons Learned From a Creditor Attack on a Third-Party Spendthrift Trusts," co-author, Steve Leimberg's Asset Protection Planning Newsletter #155, June 2010
- "Chames v. DeMayo - Waiver of Homestead Right," co-author, Steve Leimberg's Asset Protection Newsletter #124, March 2008
- "In re Lawrence - Momma, I'm Coming Home," co-author, Steve Leimberg's Asset Protection Planning Newsletter, December 2006
- "Asset Protection with Foreign Wealth Preservation Trusts," Florida Neurosurgery Newsletter, June 2006
- "Wealth Protection Planning Under the Bankruptcy Abuse Preservation and Consumer Protection Act of 2005," co-author, Vol. 30, No. 5, Sept-Oct, Tax Management Estates, Gifts & Trust Journal 269
- "New Bankruptcy Act - What Planners Really Need to Know," co-author, Steve Leimberg's Asset Protection Planning Newsletter, April 2005
- "Oklahoma's Family Wealth Preservation Trust Act," co-author, Leading Practitioner Commentary, Tax Management Estates, Gifts & Trust Journal, Vol. 29, No. 6, November-December 2004