



## LORI E. ROMANO

### Background

Lori E. Romano is a Principal in the Private Clients Group of Cummings & Lockwood and is located in the Greenwich office. Lori has 30 years of experience practicing in the area 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 and succession planning 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.

Lori 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 individuals and families across multiple generations.

Her primary focus is to understand the goals of her clients and their families and provide representation that best addresses their unique concerns and circumstances. She often advises clients across many generations, sometimes in the most difficult of circumstances or with delicate family situations. She listens with sensitivity and compassion, and her clients trust her to advise them with fairness and equity.

### Practice Areas

- Private Clients Group

### Education

- University of Bridgeport School of Law (J.D., *magna cum laude*, 1992)
- Fairfield University (B.A., *magna cum laude*, 1989)

### Bar Admissions

- Connecticut, 1992
- New York, 2016

### Professional Organizations

- American Bar Association



Lori E. Romano

Principal

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# CUMMINGS & LOCKWOOD LLC

- Connecticut Bar Association
- Greenwich Bar Association, President (2018-2019); Executive Committee (2013-2017)
- Estate Planning Council of Lower Fairfield County
- New York State Bar Association

## Civic and Philanthropic Activity

- First Congregational Church of Greenwich, Stephen Minister (2001-2011); Member of Planned Giving Committee (2000-2011); Director of Planned Giving (2011-present); Church School Task Force (2010-2018); Board of Trustees (2013-2016)
- Fairfield University Legal Studies Advisory Council (2000-2001)
- Girl Scouts of America, Troop Leader, Volunteer