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#### EDUCATION

- New York University School of Law, LL.M in Taxation, 1997
- Washington University School of Law, J.D., 1994
- Washington University, A.B., 1991

#### BAR & COURT ADMISSIONS

- New Jersey, 1994
- U.S. District Court, District of New Jersey, 1994
- New York, 1994

## Lori I. Wolf

### Member

Tax, Trusts & Estates

Lori Wolf concentrates in estate planning, with particular emphasis on wills, trusts and sophisticated estate planning techniques and special needs planning, and in corporate planning, with particular emphasis in the area of closely-held businesses.

Ms. Wolf has lectured in the areas of trusts and estates, special needs planning, asset preservation and estate planning, on topics including limited partnerships and limited liability companies.

#### NOTEWORTHY

Ms. Wolf has been awarded an AV rating for her professionalism and the quality of her legal work from Martindale-Hubbell, the premier directory of legal professionals. She has been selected for inclusion in *New Jersey Super Lawyers® Rising Stars* in Estate Planning/Trusts and *Best Lawyers in America®* in Trusts and Estates, 2010 and 2012.

Ms. Wolf has been included in 201 Magazine's list of Top Lawyers in Bergen County for 2011. She has also been listed as one of *Arrive Magazine's* "2011 Top Women Lawyers In The Northeast."

#### PUBLICATIONS

The Clock Is Ticking on Rare Tax Planning Opportunities, *New York Law Journal*, January 30, 2012

Divorce and the Special Needs Child, *New Jersey Law Journal*, June 13, 2011

5 Tips to Smart Estate Planning When You Have a Special Needs Child, *NJ Family*, March 2011

Estate Planning for Families with Special Needs Children, *New Jersey Law Journal*, February 21, 2011

The Life Insurance Checkup, *New Jersey Law Journal*, August 16, 2010

**Lori I. Wolf** (Continued)

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Simple Goals in a Complex World, *The Hedge Fund Law Report*, March 18, 2010

Estate Planning With Real Estate: Special Issues and Potential Pitfalls, *New Jersey Law Journal*, November 9, 2009

Estate Planning in a Bear Market, *Cole Schotz Docket*, Summer 2008

Special Needs Children and Estate Planning, *Garden State Woman*, Spring 2008

Guiding Wealth Through the Generations, *New Jersey Law Journal*, February 11, 2008

Effective Real Estate Ownership Structuring, *Cole Schotz Docket*, Spring 2007

Purchasing Commercial Real Estate Through an LLC, *New Jersey Law Journal*, February 5, 2007

Protect Your Family With a Special Needs Trust, *Cole Schotz Docket*, Winter 2006

Stockholders and Operating Agreements, *New Jersey Law Journal*, March 14, 2005

The Importance of Estate Planning, *Exceptional Parent Magazine*, November 2004

The Impact of Strangi vs. Commissioner, T.C., *New Jersey CPA*, July 2004

Reports of the Death of the Family Holding Company Have Been Greatly Exaggerated, *New Jersey Law Journal*, November 17, 2003

Split Dollar Agreements Need Review Before Year End, *Cole Schotz Docket*, Fall 2003

Ms. Wolf has authored several articles, including co-authoring an article on using retirement plan assets in estate planning for the *New Jersey Law Journal*, an article on charitable remainder trusts for the *New Jersey Law Journal* and a chapter of a book entitled [Starting a Limited Liability Company](#).

**LAW BLOG ARTICLES**

Qualifying for Medicaid in New Jersey Can Be More Difficult Than Qualifying in Other States, *Elder Law Perspectives*

New Jersey Medicaid Qualification, *Elder Law Perspectives*

Government Benefits for Special Needs Individuals, *New Jersey Law for Special Needs Children*

The Magic Age, *New Jersey Law for Special Needs Children*

**Lori I. Wolf** (Continued)

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Ending Your Marriage Does Not Mean Ending Your Commitment to Your Special Needs Child, *New Jersey Law for Special Needs Children*

Five Mistakes Commonly Made By Families of Special Needs Children, *New Jersey Law for Special Needs Children*

When Flexibility Matters in Special Needs Trusts, *New Jersey Law for Special Needs Children*

Letters of Intent, *New Jersey Law for Special Needs Children*

Allocation of Assets to a Special Needs Trust, *New Jersey Law for Special Needs Children*

Life Insurance is Critical for Special Needs Planning, *New Jersey Law for Special Needs Children*

Selection of Trustees for a Special Needs Trust, *New Jersey Law for Special Needs Children*

The Economy May Affect Your Special Needs Planning, *New Jersey Law for Special Needs Children*

Have You Checked Your Estate Planning Lately?, *New Jersey Law for Special Needs Children*

Your Special Needs Trust May Need Revising as a Result of Recent Policy Changes, *New Jersey Law for Special Needs Children*

Guardianship: It's Not Simply for the Elderly, *New Jersey Law for Special Needs Children*

**SPEAKING ENGAGEMENTS**

- Special Needs and Elder Law Planning, WestLegal Education CLE, Cole Schotz, Hackensack, NJ
- Extensive speaking on a range of topics from estate planning to special needs planning at various study groups, schools and support groups

**PROFESSIONAL ACTIVITIES**

- Women Presidents Organization, from 2007-2011
- New Jersey State Bar Association (Taxation Section)