

Lisa Page

ASSOCIATE | GREENWICH

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Lisa is an associate in the trust, estates and charitable planning team.

Her practice focuses on transfer tax planning, particularly advising wealthy individuals and their families on estate planning as a means of achieving tax and non-tax objectives across generations, to include creating trusts, closely-held business structures and charitable entities.

SECRETARY **SHAUNA SPINELLI**

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ADMISSIONS

- Connecticut, 2012
- New Jersey, 2013
- New York, 2014

PUBLICATIONS

'Income Taxation of Trusts in the US: Stay Tuned for Controversy,' Trust Quarterly Review (a STEP publication) - September 2019, co-author

'U.S. Supreme Court Declines to Hear Income Tax Position,' WealthManagement.com - July 16, 2019, co-author

'Update on Connecticut estate and gift tax exemptions for 2019,' Withers article - February 15, 2019, co-author

MEMBERSHIPS

- Greenwich Historical Society Professional Advisory Council

TALKS

'Buy-Sell Agreements and Related Tax Issues for the Closely Held Business,' CLE Webinar - March 17, 2020, panelist

'Roundtable Lunch with NYC based wealth advisors (Brown Brothers Harriman, HSBC, J.P. Morgan, and Bernstein),' Withers office event - January 7, 2020, co-presenter

EDUCATION

Harvard University, AB (Cum Laude) Social Anthropology and Visual & Environmental Studies
New York University School of Law, JD

LANGUAGES

ENGLISH

DATES

JOINED: 2018

Greenwich

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