



# Marve Ann M. Alaimo

Marve Ann is a partner based in the Naples, Florida office who focuses her practice in estate planning and wealth preservation. She has nearly 20 years of experience in estate and charitable gift planning, probate and trust administration as well as estate and trust litigation and guardianship.

Marve Ann focuses on conflict avoidance and cooperative problem solving as foundational elements of an estate plan, as family dynamics can often complicate an already stressful time.

She is a Florida Bar Board Certified Wills, Trusts and Estates lawyer and has served as a Florida Supreme Court Certified Circuit Civil Mediator. In addition to representing private clients, Marve Ann has also represented local, regional and national charities, nonprofits, and both private and public universities in shepherding their charitable gifts.

## Bar Admissions

Florida  
U.S. District Court for the Middle District of Florida  
U.S. Tax Court

## Presentations

- "Estate Planning Meets Family Law: How to Navigate the Inevitable Collision," UF Levin College of Law, Feb. 4, 2019
- "The Changing Face of Philanthropy," 17th Annual Conference for Advancement Vice Presidents on Jan. 28, 2019
- "The Hatfields & The McCoys: Pitfalls When Planning Devises of Real Estate," Bonita/Estero Estate Planning Professionals, Jan. 10, 2019
- "Advanced Health Care Planning," Aug. 22, 2018
- "Mom Always Liked You Best: Common Reasons Estate Plans Fail," AICPA Engage 2018, American Institute of CPAs, June 11, 2018
- "Estate Planning Still Matters," GBQ Partners, Porter Wright, May 23, 2018

## Partner

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## EDUCATION

University of Miami School of Law,  
L.L.M., *with highest honors*, 1998

University of Florida Levin College of  
Law, J.D., *with honors*, 1997

University of Florida, B.S., *with  
honors*, 1993

University of Florida, A.A., *with  
highest honors*, 1991

## SERVICES

### Tax, Estate Planning & Personal Wealth

- Wealth and asset preservation
- Estate and gift planning
- Tax
- Marital agreements, adoptions and guardianships
- Probate, trust and guardianship litigation
- Tax exempt organizations

### Litigation

- Probate, trust and guardianship litigation

### Sports

- “The Hatfields & The McCoys: Pitfalls When Planning Devises of Real Estate,” Estate Planning Conference, Ave Maria School of Law, April 27, 2018
- “Real Estate and Financial Planning Strategies Forum,” The Glenview at Pelican Bay, March 14, 2018
- “Home Sweet Home...or Not! What Every Lawyer Should Know About Homestead,” Collier County Women’s Bar Association, Oct. 25, 2017
- “Look Before You Leap! Planning at the Cliff of Client Capacity,” National Association of Personal Financial Advisors, Oct. 19, 2017; CPA Academy, July 31, 2017; American Institute of Certified Public Accountants, June 12, 2017; Collier County Bar Association, Sept. 1, 2016; Ave Maria School of Law, May 6, 2016
- “It’s Risky Business! Litigation in the World of Estate Planning,” American Institute of Certified Public Accountants, June 13, 2017
- “Let’s Talk! Why Gender Matters in Firms and Client Relationships,” American Institute of Certified Public Accountants, June 13, 2017
- “Parlez Vous International Estate Planning?” Ave Maria School of Law, April 28, 2017
- “It’s Time for a Check Up! Addressing Health Care Issues and Medical Planning in the Estate Planning Context,” Ave Maria School of Law, April 28, 2017
- “Silly Lawyer, Tricks Aren’t Just for Kids: Civil Procedure for the Wills, Trusts & Estates Lawyer,” Collier County Bar Association, Feb. 24, 2017
- “Hey @grandkids, Like Me on Facebook! Estate Planning with Digital Assets,” Estate Planning Council of Lee County, April 21, 2016
- “The Intersection of Family Law and Estate Planning: Everything you Need to Know to Make the Right Referrals,” National Asian Pacific American Bar Association, March 24, 2016
- “Ethical and Professional Pitfalls in the Chronology of a Probate Dispute,” Lee County Bar Association, Dec. 1, 2016

## **Publications**

- “Six ways you can bolster your clients’ testamentary capacity,” *NAPFA Advisor*, March 2018
- “Civil procedure can be the probate lawyer’s friend,” Lee County Bar Association, August 2016

## **Honors | Awards**

- *Florida Super Lawyers*®, Estate Planning & Probate, Estate & Trust Litigation
- *Florida Super Lawyers*®, Rising Stars, 2010 - 2012
- Lee County Bar Association, Pro Bono Service Award, 2009
- *Gulfshore Life*, Five Star Wealth Manager

## **Community**

## **PROFESSIONAL ASSOCIATIONS**

- Collier County Bar Association, *Trust and Estates Section*
- Estate Planning Council of Naples, Inc., President-Elect
- Lee County Bar Association, *Trust and Estates Section*
- The Florida Bar, *Real Property, Probate & Trust Law Section*; *Guardianship Law Committee*, Member; *Elective Share Ad Hoc Committee*, Member



- Ave Maria School of Law Estate Planning Conference: Conference Co-Chair, 2018; Speaker Selection Subcommittee, Co-Chair, 2016 - 2017
- Chi Omega Fraternity, Pi Mu Chapter, Financial Advisor
- Girl Scouts Gulf Coast Florida, Volunteer
- National Kidney Foundation of Florida, Inc., Trustee
- Girls Going Places, Entrepreneurship Conference Mentor, 2018