



# Marve Ann M. Alaimo

*partner*

Marve Ann co-chairs the Trust, Estate Planning and Personal Wealth Practice Group at Porter Wright. Marve Ann focuses her practice in estate planning and wealth preservation in the firm's Naples, Florida office. She has more than 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 private and public universities in shepherding their charitable gifts.

She frequently lectures on a variety of estate planning and probate litigation topics. She has also been interviewed by writers for various outlets including CNBC and has been quoted in articles published in national and regional newspapers and magazines.

#### BAR ADMISSIONS

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

#### PRESENTATIONS

- "Critical Problems in the Implementation of Estate & Gift Tax Planning," Collier County Bar Association Trusts & Estates Section, May 2, 2024

#### CONTACT

malaimo@porterwright.com  
239.593.2964  
www.porterwright.com

9132 Strada Place  
Suite 301  
Naples, FL 34108

#### 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
- Family office

- “Nuts & Bolts of Minor Guardianships,” Florida Bar, Real Property Probate & Trust Law Section, April 12, 2024
- “The Hatfields & the McCoys: Pitfalls When Planning With Real Estate,” Greater Boca Raton Estate Planning Council, Feb. 13, 2024
- “Critical Problems in the Implementation of Estate & Gift Tax Planning Techniques,” Florida Institute of Certified Public Accountants, Collegiate Accounting Symposium, Nov. 15, 2023
- “Succession Planning for Families and Businesses,” Porter Wright, Sept. 21, 2023
- “Dependents’ Divorce Dilemma Solved!,” Florida Bar, Real Property Probate & Trust Law Section Legislative & Case Law Update Seminar, July 21, 2023
- “International Estate Planning,” Florida Bar, Real Property Probate & Trust Law Section Wills, Trusts & Estates Certification Review Course, April 1, 2023
- “*I Care A Lot* vs Real Life,” Porter Wright, Sept. 15, 2022
- “Ethical Considerations,” Florida Bar, Real Property Probate and Trust Law Section Minority Lawyers Seminar Series, May 14, 2022
- “Past, Present and Future of the Duty to Inform: Practical Guidance on Advising Trustees,” 34th Annual RPTE National CLE Conference, American Bar Association Real Property, Trust and Estate Law Section, April 27, 2022
- “Playing Nicely in the Sandbox: Use of Alternative Dispute Resolution in Contested Guardianships,” The Florida Bar 2021 Annual Guardianship CLE Webcast, Dec. 2, 2021
- “Select New Rules and Best Practices in Probate & Guardianship,” Collier County Bar Association Trusts & Estates Section, May 6, 2021
- “Never Too Late: Wills, Trusts and the Art of Wealth Transfer for the Young at Heart,” Florida Bar Senior Lawyers Committee CLE, Jan. 15, 2021
- “Probate & Trust Litigation Seminar: Knives Out! versus Real Life,” Porter Wright, Nov. 10, 2020
- “Look Before You Leap! Planning for the Client at the Cliff of Capacity,” Florida Institute of Certified Public Accountants Fall Conference, Oct. 29, 2020; National Association of Personal Financial Advisors, Oct. 19, 2017; American Institute of Certified Public Accountants ENGAGE Conference, June 12, 2017; Ave Maria School of Law Estate Planning Conference, May 6, 2016
- “Best Practices for Guardianship Administration,” Florida Bar, Real Property Probate and Trust Law Section Annual Guardianship CLE, Sept. 11, 2020
- “Mom Liked Me Better and She Will Prove It: Pre-Mortem Validation – Permanent Solution or Fad,” American Bar Association, Real Property, Trusts & Estates Section National CLE Conference, May 15, 2020

## SERVICES (CONTINUED)

### Litigation

- Probate, trust and guardianship litigation

### Sports

### Mergers & Acquisitions

- Family office

### Business Growth & Operation

- Family office

- “The Hatfields & The McCoys: Pitfalls When Planning Devises of Real Estate,” Estate Planning Council of Greater Miami, March 21, 2019; Ave Maria School of Law Estate Planning Conference, April 27, 2018
- “Estate Planning Meets Family Law: How to Navigate the Inevitable Collision,” University of Florida Levin College of Law, Feb. 4, 2019
- “The Changing Face of Philanthropy,” 17th Annual Conference for Advancement Vice Presidents, Jan. 28, 2019
- “Mom Always Liked You Best: Common Reasons Estate Plans Fail,” American Institute of Certified Public Accountants ENGAGE Conference, June 11, 2018
- “Home Sweet Home...or Not! What Every Lawyer Should Know About Homestead,” Collier County Women's Bar Association, Oct. 25, 2017
- “It’s Risky Business! Litigation in the World of Estate Planning,” American Institute of Certified Public Accountants ENGAGE Conference, June 13, 2017
- “Let’s Talk! Why Gender Matters in Firms and Client Relationships,” American Institute of Certified Public Accountants ENGAGE Conference, June 13, 2017
- “Parlez Vous International Estate Planning?” Ave Maria School of Law Estate Planning Conference, 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 Estate Planning Conference, April 28, 2017
- “Silly Lawyer, Tricks Aren’t Just for Kids: Civil Procedure for the Wills, Trusts & Estates Lawyer,” Collier County Bar Association Estate Planning Symposium, Feb. 24, 2017
- “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, 2015

## PUBLICATIONS

- “Chapter 22: Guardian advocates,” *Florida Guardianship Practice 12<sup>th</sup> ed.*, The Florida Bar Legal Publications, 2022
- “Estate planning lessons from Mookie Betts and Fernando Tatis, Jr.,” *Wealth Management Magazine*, April 21, 2021
- “Mom liked me better, and she will prove it: Pre-mortem validation—permanent solution or fad?” *Probate and Property Magazine*, March/April 2021
- “Chapter 11: Estate Planning,” Florida Bar International Law Section, International Law Deskbook 2020
- “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

## PROFESSIONAL ASSOCIATIONS

- Collier County Bar Association, Trust and Estates Section
- Estate Planning Council of Naples, Inc., past President
- The Florida Bar
  - Real Property, Probate & Trust Law Section
    - Executive Council, At-Large Member
    - Guardianship Law Committee
    - Professionalism & Ethics Committee

- Diversity and Inclusion Committee
  - Grants Subcommittee, Co-Chair
- Florida Probate Rules Committee

#### HONORS | AWARDS

- *The Best Lawyers in America*®
- Florida Super Lawyers
- Florida Super Lawyers, Rising Stars Edition
- Lee County Bar Association, Pro Bono Service Award, 2009
- *Gulfshore Life*, Five Star Wealth Manager
- *Naples Illustrated*, Top Lawyer, Trusts and Estates

#### COMMUNITY

- National Kidney Foundation of Florida, Inc., Board of Trustees, President, 2022-2024; Vice President, 2020-2022
- 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
- Girls Going Places, Entrepreneurship Conference Mentor, 2018