

WOMEN'S LEADERSHIP INITIATIVE'S MENTORING MOMENTS

Episode 02: Marve Ann Alaimo and Michael Sneeringer

The following is a transcription of the audio podcast recording. It is largely accurate but in some cases it is incomplete or inaccurate due to inaudible passages or transcription errors.

This is Molly Crabtree and welcome to Porter Wright's Women's Leadership Initiative's Mentoring Moments. Today you'll hear from two of our partners in the Naples market, Marve Ann Alaimo and Michael Sneeringer. Michael interviews his mentor Marve Ann, as she shares how her experience has shaped their working relationship together.

Michael: Marve Ann it's so nice to see you today. How is everything?

Marve Ann: Very good, very good.

Michael: Marve Ann, how long have you been in this industry for?

Marve Ann: Oh my gosh, see, now you're asking me to give away my age, sort of, kind of. So I think I have now been an estate planning attorney for about 25-26 years.

Michael: Wow. Tell us a little bit about your practice. I'd love to know what you do, exactly.

Marve Ann: So I always tell everybody that by training, I'm a tax lawyer, because it sounds cool. But really, I do wills and trusts. So I draft complex estate plans. I give people complicated tax advice on how to minimize estate and gift taxes. But the other more exciting part of my practice, is doing probate trusts and guardianship litigation, which I've probably been doing now - I always say 15 years, no matter how long it's been, but it's, so it's probably been more like 20. If I really sat down and counted. So.

Michael: So on the come up through your legal career, to get into those specific areas of law, what I think a lot of people don't understand is, you don't just get out of law school and start practicing those areas. You kind of have a mentor, or somebody at the firm that looks at you and says, oh shoot, Marve Ann's a superstar. She's going to shine. Who were those people early on in your career, and sort of, how did they mentor you?

Marve Ann: Well, I think for me, because our practice area is so specific. You know, we don't come out of law school or out of the gate, knowing how to do trust and estates. We actually a lot of times have to get some specialized training. So for me, one of my early mentors was actually back in law school, when I decided that tax law was a thing and that it was very cool. I had a really fabulous professor at the University of Florida. His name is Dennis Calfee. And he was probably what I would consider my first mentor in the area, because he was the one who really got me very excited about tax law.

Michael: How did he get you excited?

Marve Ann: You know, I think when you are taught by somebody who has a lot of enthusiasm for what they do, whether it's law, or any other thing, anytime you have any professor that is excited, enthusiastic, does it with a smile, you know, can make you laugh, that's the thing that really excites your student. He had a certain showmanship when he was teaching the class and could take like this really dry subject that's full of like, dollars and cents and numbers and figures and make it really interesting and could tell a lot of interesting stories that went along with the problems. And so I think he was the first person that really got me interested in it, and could show me that there was a career in that. And so he was probably my first early mentor. But like I said, that's in law school.

Michael: So what did mentorship look like in your first few years at your prior firm? And how did that help you grow into the practitioner you are today?

Marve Ann: Well, when I started, I was really lucky to be in a firm that had a lot of estate planning attorneys. I think there were probably like, 10 of us which, in my one office. I mean, the firm as a whole had probably about 60 of them together, which is unusual for law firms. Usually those, estates and trust practices are small, but I was very lucky to join a rather large practice. And I just was able to see a lot of different people approach the practice of law in a lot of different ways.

So I would say that my mentorship was really varied. I had a lot of role models to be able to look at. I had one who was just a great technician, really focused on learning the statutes and crunching the numbers, and really was somebody that I considered to be a just a very strong practitioner. But you know, he was very good at the law. But when it came to maybe going out and finding clients that wasn't necessarily his strong point. So I look to him as a mentor for the technical side, and how to be a strong technician and really know the law inside and out.

But then I had other mentors that helped me sort of understand the other parts of being a lawyer. And the part that I didn't really understand when I was in law school is the part about being a business person. Because part of what we do as lawyers, it's not just understanding the law, and speaking to others about the law, it's, part of it is selling what we know; trying to influence others, to hire us, because we know how to do our jobs well. Some of my early mentors, I was able to watch them, do that part of their job, and really learn from that experience. They really taught me to figure out what it is about myself, that made me different, that set me apart, that made me a person that people would want to talk to, and really try to pitch that aspect of myself. So one of my early mentors used to work with you too Michael, at your prior firm as gentleman by the name of Joe Cox, probably in this town, in Naples, one of the best examples of a rainmaker that I've ever seen, because he was just able to converse with anybody about anything, and really engage them. And because he was so engaging, was able to really rein in so many clients. And so I watched him and really studied how he approached people how he explained really complicated concepts to people, and how he was able to, you know, really captivate people with his, his demeanor, his behavior, his way of speaking. And that was probably one of the best educations I had, and really learning how to be not just a technician, but also a lawyer.

Michael: So is it fair to say that a lot of your mentoring was by observation early on? Or was some of it trial and error as well? Like giving that practitioner you mentioned, that was more X's and O's? Giving that person documents, getting them back? Or did you have that part down and it was more the business aspect and watching that person you mentioned from afar, land the

client, do the dinner, or give the presentation? And then have the people coming up to them afterwards asking questions? Which one? Or maybe it was a combination?

Marve Ann: You know, what? That's a good question, because I think, for me, a lot of the mentoring I receive is really by observation. You know, I think it brings up a point for me that I'll be honest and say, I don't know if I ever felt directly mentored in the sense that I don't know if the people that I identified as mentors, other than one, you know, there was one that I think was a direct mentor of mine. But I think most of the people that I looked to as mentors didn't really know they were mentoring me. I don't think they set out to say, I'm going to sit down with Marve Ann, and teach Marve Ann how to be a good student. Teach Marve Ann how to be a good lawyer. Teach Marve Ann to be a good salesperson. I don't know that they really knew how much they were influencing me. I think there were people who genuinely tried to build relationships with me. And people who brought me along, gave me assignments, let me participate in client meetings.

But the things that I learned from them were not because they sat down with me and said, Hey, Marve Ann, I want to teach you this, or I want you to know this. Most of the time, it was really just me watching them, and picking up things from them. And then watching the reactions of the clients or the people that they were talking to, and really seeing that, oh, you know, when this person does this, this client reacts really positively. And so it was really by observation that I was mentored for most of my career. I think wasn't until, I don't know, maybe halfway through the career, where I felt like I actually had a direct mentor who was sitting down and talking with me and giving me specific advice because he wanted to be an actual mentor and fulfill that role.

Michael: Maybe talk a little bit about that specific mentor and mentoring and mentorship, because I think it helps folks that are listening then understand how we've developed our mentee-mentor relationship.

Marve Ann: The way that this sort of mentor relationship came about is, I was working at my firm's satellite office here in Bonita Springs. And the partners came to us at the time, I think I was still an associate, and said, we are going to be bringing on a new lateral partner from another law firm. And they wanted him to be able to come down and meet us in our office, so that he could get comfortable with the people he was merging in with. So he came down, met with us, he asked a lot of questions. I was actually a little bit afraid and concerned that when he joined our firm, that I might actually hate working for him. And when he first joined, I realized that my impression couldn't have been more wrong, and that I actually had a lot to learn from him. He was really good about sitting down with me in the very beginning, saying, Listen, you know, I have a lot to learn from you, I have a lot to learn about how you guys do things. Show me how you can bring value to me, because I just don't know. And when he said that, to me, I realized that there can be a given take in a mentorship relationship between a partner and an associate. I think, for many years as an associate, because I wasn't I because I didn't feel directly mentored and was doing everything by observation that all the information was going downstream. It was going from the big partner to me, as the young associate, and I was soaking in that information, and mimicking what the big partner did. Thankfully, the big partner was always somebody that I respected, and I thought did good work and was very smart. But this new relationship I had with this other partner, Bill Horowitz, I realized that, mentoring wasn't just downstream, it just didn't go from the more experienced to the less experienced that he could go upstream as well, and that it could be collaborative, and that I could bring ideas to the table. And he would think on those ideas and sometimes adopt those ideas. And so that's probably when I started developing like a more direct mentor relationship.

And we, we talked not only about the law, and the type of work that we were doing, and the, the unique problems that the clients had. We also talked about the other things that sort of affect our practice. Our family lives, I realized that the mentor relationship didn't just have to be about the work, but also the things that surround the work. So that today is still kind of the most valuable mentor relationship I had, because it was so collaborative.

Michael: Yeah. So that bilateral approach, I think is important to expound upon. So I'm just curious, your first few times, working with mentees, why did those sort of not work out?

Marve Ann: Well, you know, like I said, I think for me, I learned the best mentoring relationship for me was this bilateral mentorship where there is a given a take, and we're where we're both contributing. But I think the reason why it worked very well to be collaborative is because he made it easy to share. I mean, he was the first one to come in and say, I want to learn something from you. I think in the beginning, when I first started mentoring associates, you know, I didn't fully comprehend how my mentorship relationship was different than the mentorship relationships I had with other attorneys.

I do think that I kind of fell into that syndrome that a lot of folks do when they kind of graduate from one level to another. When you get to the partner level, you think about what your life was, as an associate. And you sort of think when the associates come up behind me, they've got to go through the same pains that I went through. In the beginning, with my earlier mentees, where I said to them, Listen, you know, when I was an associate, and I was drafting projects, sometimes I'd get things back, and you know, a lot of changes would be made. And I didn't understand why. But this is part of the process. This is how you learn. I used to say to mentees, and I think I even said it to you one time, Michael, I have a pen, it's red, and it bleeds. Just deal with it. You know, because I thought that that was what I was supposed to be doing as a mentor is like teaching them how to write better or how to draft better. And so I think a lot of my earlier mentoring relationships didn't go as well as they should have.

I think over time, I learned that that was not the best style of mentoring that I'm not there just to tell them how to do the work and how to do it competently. I'm there to teach them how to live in this job and how to make it part of their life. Unfortunately, for those other people that preceded you, Michael, I had to practice with them and learn that the top down, it didn't work for me as well as it did the other and so it wasn't going to work for them. And eventually, I got to a place where I realized that did have to be a little bit more, give and take. There had to be an exchange, and I had to be a little bit less intimidating and more welcoming.

Michael: Well, I think for me, it was the lack of intimidation here, because I'll be honest Marve Ann, I'm always taller than those that are mentoring me. So the pen is bleeding thing never came up between us. But I do find that fascinating. And my favorite thing that you would say is, Well, Michael, like I tell all the others, none of these changes are going to be consistent, I'm gonna have different changes on the same document for different clients, and you're just gonna have to figure it out. That was the one thing I did get. But that didn't matter to me. At first, I tried to keep a drawer of Marve Ann markups. But I realized quickly that that drawer was merely a fire hazard, and not a guidebook. So I got rid of it.

The big thing, and we've talked about this before, but our big moment wasn't when I interviewed, and it wasn't during work. We were going to lunch, and we were meeting with two people from a large corporate financial institution. And we were meeting these people at the restaurant called The French downtown here in Naples. And we were parking. And I was getting

nervous because my whole career was working for XYZ person. And then the plan was, they will die. And I will get a book of business.

Marve Ann: That is so morbid, Michael!

Michael: But that was what I was taught. That was the bad part of the mentoring I had. And I remember being so nervous, like I had uprooted family. And I only had three kids at the time, I didn't have five. So I wasn't too worried about finding that next job. But I wasn't very busy. And I just remember saying to you Marve Ann something along the lines of, oh, well, you know, how am I going to have like eight hours of work to do every day, I'm used to working all these hours. And it really was some type of employment PTSD that I had, because you just kind of stopped me dead in my tracks. And we're like, well, you're gonna have your own book of business. This arrangement is kinda like temporary Michael. This attorneys gonna retire and there'll be work there that you pick up, you'll still help me. But you're gonna help other team members at our law firm.

And I think those were two big moments for me, because I learned from you number one, that I can do it, I can have my own book of business. And number two, looking at it not so much as a bunch of people competing. But as one big team that had never been really explained to me that way. It was always here's the trust and estates partner you're working for now, work for them. And when they retire, the clients are yours. But I always thought is that, is that it for me? And you helped me understand that, no, that's not really it for me. We could be good as a team marketing, or winning the business together. As opposed to, here's the business I want you do the work.

Marve Ann: I mean, and I think that's what's you know, is kind of different about our mentor relationship versus other attorneys. Because I do think that there's a lot of the style of mentorship you talked about where it's, you know, you work for one partner for a very long time. And then when that partner decides that he or she can no longer work anymore, you just sort of work...

Michael: Or dies.

Marve Ann: Or yeah, you inherit their business. And then you know, you could you fall into the same cycle of you find an associate that works for you until you don't want to work anymore, and they inherit your business. I think that's, that's kind of like the old style of, you know, legal practice, or at least that's what I think it should be is the old style of legal practice. Because I think that, you know, there's a lot of business out there to get, you know, you don't have to inherit your business, you can actually make it yourself in the early part of my career where my mentoring was from top down. I had that aim, you know, belief that you had that, I just waited for the person that was ahead of me to sort of pass down clients to me. And admittedly, I got clients that way. But, as time passed, I also learn from others that I worked with, that it was okay for me to build my own practice, and that they could help me do that. They weren't just going to take it all for themselves, and then make me work on their projects that they were willing to share. And when you and I started working together, I said to you, listen, I was lucky that when I left my old law firm, a lot of my clients came with me. So I came in with a nice, healthy portfolio of clients, and when new clients would come in, that needed help, that maybe I couldn't give them because they didn't have the time to devote to them, or because they wanted something like, creditor protection advice, which, you have a lot more background on. Then I could say to you, listen, you can have these clients. And so, you know, I think that team, concept, that team relationship, it builds trust. I think our relationship works, because you can trust me, because I'm

not borrowing all of your knowledge and know-how. I'm actually I'm also, sharing some of what I have with you. So.

Michael: Well, I think what's also helpful, helpful to people listening, is there gonna have questions like, How does Marve Ann let him work with five children? Shouldn't he be home tending to these able-bodied children. And I think that's one thing people need to realize is, from day one, your guidance has always been family first. Clients, they'll come and go, but family's here forever. And I think that was a good lesson that I learned from you. A work life balance, you know, both of your kids still talk to you. And we both know people who are in our industry that are thrice divorced, or have terrible relationships to no relationships with their children. I guess I've described a little bit about how we kind of interact and the advice you've given me with respect to being a working father. I guess, where did your guidance come from on being a working mother? And what can you share that maybe I haven't articulated properly? What can you share to those listening who are working parents that kind of need guidance on what to do, how to do, when to do?

Marve Ann: So I think you're assuming that I got guidance. And that, you know, the reality is, you know, I think for me, it was like a trial by fire, I didn't get a lot of good guidance. In fact, I think in my prior career, I did put more of a premium on work. And admittedly, I put more of a premium on getting my work done and putting family second. I think you are getting the benefit of me sort of looking in hindsight, and realizing that maybe I went about it the wrong way.

I mean, I grew up in a family where everybody understood that the parents had to work because, putting food on the table, getting clothes on your body was, that was important. And that sometimes the parent had to sacrifice their time with their family, in order to do all those things, to put food on the table; clothes on the back; and get into school. I think that's, you know, honestly, that's inherent in my culture, because I'm Filipino. And a lot of, you know, Filipinos, unfortunately, the parent has to work at a distance from the home. And so, in my parents' country, there are kids who don't see their parents for weeks at a time because the parent lives somewhere else, because they can't find work where they're growing up. And so that's kind of how I came up.

And I was, I spent a lot of my early years working, working, working and believing that my family knew that I was working, and that it was a sacrifice to work all the time, because ultimately, what I was going to be able to do for them with the money I earned was going to help them. And then I, I think what happened with me as you know, Michael, I have a chronically ill disabled son. And that really, I think, oriented things differently for me. You know, when, as he was growing and getting older, and having medical procedures and lots of doctor's appointments, I realized that I have to be there for some of those things and that you know, work can't be everything because I've got somebody who now needs me much more who can't be independent on their own in the way that other kids grow to be independent. My son still needs help. He's 23 years old. And sometimes he doesn't like to be home alone. So I had to learn how to orient in the other direction.

And I think I've learned that I think, I think I've learned that there are a lot of things that you can miss in life when you work too much and too hard. And that, family does remember, your kids will remember not seeing you all the time, they will remember, you not being there for certain occasions or certain events, I can even remember in my own life times where my parents were not at something that I wish they could have been at. Because, they felt that the work was something that was important to them, and that I as a child needed to understand that, that that

was part of their job. Now, I have a great relationship with my parents, and I love them. But I also wish that certain things could have been different.

So I think when I mentor you, and we talk about family, especially now that you are the father of five, I realized that some of those moments you have with your family, you will never get back. I, I look at my own kids who are now 23 and 17. And I think to myself, you know, that time went really, really fast. And, the work, the work will always be there. Part of I think the reason why I like working in a team concept is because working in a team, and being able to delegate to your team, share with your team and rely on your team gives you the ability to be able to have that work life balance, so that if there's something that I need to do with my family, but something I need to do for my client, that I can look to my team to help me, be able to achieve both of those goals at the same time. So, I think this is one of those situations, Michael, I don't want you to make the same mistakes I've made by putting yourself too much in your work, and not remembering that there's more to life than just our work. I mean, we might love our work, and we might love doing our work. But I think we love our families too. So.

Michael: I think the last thing we need to talk about is identifying a mentor, because I identified you and I think this will help people. I identified you at a time in my career when I was kind of undetermined. I knew I was probably staying in Naples. But I wasn't completely sure. I knew that I wanted to be a trusts and estates lawyer and that I was in the right field, but I still had doubts. And so I went to the Collier County Bar Association's trust and estate symposium, and you kind of just went up to speak, didn't really seem all that prepared. So I went, Okay, that's how I speak. I get up there. And I just kind of riff and I go and I'm confident. I know what I'm saying like, what are these people here to see me like they don't know more than me. And if they do, I'm going to show them that they don't. Let's teach them one fact. And that'll be the one fact I hang my hat on.

Okay, you just kind of went up there and went whoomb. And so when I was looking and somebody passed along your name to me, I was like, Oh, I could work for that person. I could work for that person because I've heard them speak. I've seen their confidence and abilities, and I think that I could learn something from them, instead of somebody getting up there and selling family limited partnerships or grants, grants or something for the 1,000th time. But that was my experience. And so I looked for somebody. Number one, we are different sexes. We're different nationalities. We have different heritages. We have different credentials.

Marve Ann: We have different hair.

Michael: You have hair, I do not. We have different athletic tastes and pursuits and hobbies. And so maybe different is the way that helped me. But maybe what could you bring to the table and add to what I think might be a good idea for somebody looking for a mentor out there that's listening?

Marve Ann: Well, you know, I think that what you talked about is actually was that's probably a nice way to find a mentor, looking out there and then finding somebody who is doing something that you admire. I knew that you had seen me speak at the symposium and I knew that was something you know, that had something to do with why you interviewed with the firm. I like just how you describe that I killed it. Thank you so much.

You know, I think that, again, for me, because I wasn't actively mentored, I don't know that I ever did a good job at like looking for and finding for finding mentors, I think ultimately, the mentor relationship just happened out of coincidence. You know, this guy was my professor, or

this was the person that I was working for. But I think, you know, when you work in a firm, where there's a lot of people, you have the opportunity to look around and see, you know, who impresses you and who strikes your fancy. I think that's the one thing that I probably realized now that I didn't realize before that, you know, my mentor did not have to necessarily be the person that was assigned to me. I know, like, in this firm, and in some other firms, you are assigned a mentor, somebody that, they say, this is the person that is going to mentor you.

But I mean, that's just one mentor that you have, I think you can should go out and look for other mentors. And if you see somebody that, just like you did, you walk around and you look at that person, you go, Oh, that person is really killing it. How do they do that I want to learn what they do, I want to know how they do that. I mean, you can make that person, your mentor. It doesn't have to be an assigned relationship. And it doesn't even necessarily have to be somebody that you work directly under. It doesn't have to be somebody that practices in the same area as you or does the same thing you do. It can just be somebody that has qualities that you really admire, that you want to emulate. And, you know, I think that's kind of what you described, Michael, is that, you know, you were able to observe me, and there was something about, you know, the way that I gave that presentation that you said, I'd like to do that, too.

And so I mean, I think there are a lot of people within the firm that are rock stars at what they do, and that you could learn from. I think, one should never be shy about approaching those people and saying, hey, you know, I see that you do this, you know, and I think that you do it exceptionally well, I'd really just like to watch, and continue to watch you how to watch how you do that so I can learn how to do it too. I think as I said, I got mentored a lot by observation by watching people that did something that I thought was extraordinary. And I admired it, you know, when I sat down and watched Joe Cox, laying an estate plan by drawing buckets and water pouring into buckets, I thought to myself, That's so simple, I should do that, too. And I emulated that.

And so that's, you know, I think that's how you find your mentors, you find them by looking for the people that are doing something that you think is cool and innovative, and then wanting to emulate that the difference between I think, the way that I did it, and you did it, is that, I never asked you, Hey, can you teach me how you do that, or when you come up with that idea to do that? Or, Hey, I'd like to just sit and watch you for a little while and go with you to different things. I never did that. I just sort of, you know, surreptitiously watch from the sidelines, maybe sometimes when he wasn't even realized that I was watching. Whereas with you, you do proactively come and ask me and say, Hey, I'd like to do this, can you tell me a little bit about how you've done it? And I think, you know, obviously, I like your approach better. Because I think then if I'm active in mentoring you, then I can share with you not just the great things that I have done, but also some of those other things that I wish I'd done differently. Like the whole situation with family life and work life. So just really look for the people that totally impressed you. And then approach them and say, I really want you to be my mentor. I mean, what's the worst that can happen? Right? They could say no. So. But then you could be like you Michael and just be completely, you know, persistent.

Michael: Yeah, you just apply for the job. Keep showing up to the interviews. Marve Ann, thank you so much for doing this with me. This is another WLI Mentoring Moments podcast for Marve Ann Alaimo. I'm Michael Sneeringer, thank you so much for listening to us.

Disclaimer: Porter Wright Morris & Arthur LLP offers this content for informational purposes only, as a service for our clients and friends. The content of this publication is not intended as legal advice for any purpose, and you should not consider it as such. It does not necessarily reflect the views of the firm as to any particular matter, or those of its clients. All rights reserved.