

Fisher Broyles

Name: Lisa Schubel

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Direct: (267) 797-5668

Office: Princeton and Philadelphia

Practice Areas: Private Client Services; Tax; Trust & Estates

Bar Admissions: New Jersey; Pennsylvania

Education: Temple University School of Law, JD, 1998; San Francisco State University, BA International Relations, 1992

Experience: Cozen O'Connor; Fox Rothschild; Hill Wallack

Ms. Schubel concentrates her practice in the area of Estate Planning, Estate Administration, Trusts and Trust Administration, Elder Law and Taxation of Trusts and Estates. Ms. Schubel also practices in the area of charitable giving including the formation of charitable trusts and entities as well as counseling clients on the, tax implications of charitable gifts and various types of charitable planned giving techniques.

With respect to Estate Planning, Ms. Schubel has extensive experience drafting estate plans from the simple to the sophisticated including the preparation of Wills, Revocable Trusts, Irrevocable Trusts, Powers of Attorney, Advance Directives for Health Care (Living Wills), Succession Plans for owners of closely-held businesses, Special Needs Trusts for Elderly or Disabled Clients, and other specialized Trusts such as Irrevocable Life Insurance Trusts (ILITs), Qualified Personal Residence Trusts (QPRT's), and Defective Grantor Trusts (DGTs). She also represents clients on making annual gifts to family members, other individuals and charitable organizations. She has experience counseling clients on Federal gift tax laws and preparing Federal Gift tax returns. With respect to Estate Administration, Ms. Schubel has a broad background representing personal representatives of Estates in administering Estates from the inception of the Estate to the distribution to the beneficiaries including the preparation of probate documents, Federal Estate Tax Returns, State Inheritance and Estate Tax Returns, the Decedent's Final Lifetime Income Tax Returns, Fiduciary Income Tax Returns for the Estate, Court Accountings, and Family Settlement Agreements. On the other side, she also represents beneficiaries of

an Estate and counsels the beneficiaries on their right to receive information from the personal representative and to ensure that they receive their share of the Estate.

With respect to Trust Administration, Ms. Schubel has experience administering Trusts from their inception to termination including the day to day operations of the Trust, and the preparation of court accountings, annual accountings and annual Fiduciary Income Tax Returns.

Ms. Schubel counsels elderly clients and their families on all aspects of Elder law including Health Care Decision Making (preparation of Powers of Attorney and Living Wills), testamentary documents, capacity issues, Guardianships, and Medicaid Planning.

Ms. Schubel has presented numerous seminars on all aspects of estate planning and administration.

Ms. Schubel was selected for inclusion in Pennsylvania Super Lawyers - Rising Stars Edition 2007. She was also voted Best Attorney in Bucks County, Pennsylvania by Bucks Happening (2015).

Representative Transactions

- Represents individuals in all aspects of estate planning, including the preparation of Wills, Trusts, Powers of Attorney and Advance Health Care Directives (Living Wills)
- Represents owners of closely-held business entities in connection with integrating Succession Planning and Estate Planning
- Represents adults with disabilities and parents of children with disabilities in matters requiring Special Needs Trusts and Estate Planning coordination
- Represents Executors and Administrators in Estate Administration matters
- Represents Trustees in Trust Administration matters
- Represents Beneficiaries of InterVivos Trusts and Testamentary Trusts
- Represents elderly clients and their families in areas of Elder Law
- Represents clients on the formation of charitable entities as well as charitable planned giving techniques

Presentations & Teaching Experience

- Course Planner and Presenter: Using Life Insurance in Estate Planning and Drafting Wills. Pennsylvania Bar Institute (PBI)
- Course Planner and Presenter: Basic Estate Planning and Administration. National Academy of Continuing Legal Education (NaCLE)
- Course Presenter: Estate Planning from A to Z. National Business Institute (NBI)