Lorianne Spurr

Trust & Estate Administrator

Private Wealth, Estates & Trusts

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Overview

Lori is a Trust and Estate Administrator and has more than 30 years of experience in the field. Her experience spans both estate planning and estate/trust administration. On the estate planning side, she has met with and assisted clients by drafting wills, trusts, financial and health care powers of attorney, and preparing the necessary documentation to fund revocable and irrevocable trusts. In regard to estate/trust administration, she is involved from start to finish, including preparing and filing probate/administration documents with courts throughout New York and New Jersey, working with clients and financial institutions to gather and liquidate assets, and preparing fiduciary accountings along with Executor/Trustee releases when it is time to distribute assets to the beneficiaries. Lori also has extensive experience in tax return preparation, including individual and fiduciary income tax returns, estate and gift tax returns, private foundation returns, and has assisted clients with both federal and state income and estate tax audits and the IRS's voluntary disclosure program for reporting of foreign bank accounts.

Credentials

Education

- New York University, MA, Economics
- Boston University, BA

Offices

- Hackensack, NJ

Areas of Focus

Practice

- Private Wealth, Estates & Trusts