

Marie Lombardo Holt

Trust Administrator

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Marie Lombardo Holt is a trust administrator in the Firm's Trusts and Estates Practice.

With over 40 years of experience, she assists attorneys with all aspects of estate and trust administration, including preparation of petitions for probate and administration, marshalling assets, and obtaining valuations. Her work involves the collection of assets, preparation of federal and state estate tax returns, and the preparation, review, and maintenance of all trust and estate accountings, including all bookkeeping functions and ultimate distributions of estates and trusts to beneficiaries.

She serves as a liaison among attorneys, clients, taxing authorities, accountants, and fiduciaries.

Education

- St. John's University (B.S.)
- Adelphi University
 - ABA Program – Certificate in Paralegal Studies

Community Involvement

Marie assists families in her community with information to help them connect with organizations that provide services for their elderly family members.

Related Services

- Trusts & Estates