

Lori A. Lewis
Partner

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Education

Santa Barbara College of Law, J.D. 1990
Certified by The Board of Legal Specialization of the State Bar of California as a Probate, Estate Planning and Trust Law Specialist
University of California, Santa Barbara, B.A., 1986

Memberships

BAR ADMISSIONS
California

MEMBERSHIPS
State Bar of California
Santa Barbara County Bar Association
Santa Barbara Women's Lawyers Association

Lori's law practice concentrates in the areas of estate planning and incapacity, advising clients on matters involving powers of attorney, conservatorships, advanced health directives, wills, and trusts. Lori handles many legal matters that involve the high emotional intensity of family conflict. For that reason, when necessary and appropriate, Lori uses either tools of mediation or litigation, or both, to resolve conflicts related to conservatorship and post-death probate & trust administrations. Lori works closely with individuals and their professionals, such as income tax preparers, medical caregivers, and investment advisors in giving advice and preparing customized incapacity and estate planning documents. She also works with fiduciaries, both private and professional, and family members, in administering conservatorship, probate or trust administrations. Lori assists clients in preparing and executing estate planning documents to memorialize their testamentary wishes, avoid probate, and reduce or eliminate estate taxes, whenever possible, while reducing the likelihood of conflict and promoting efficiencies in administration.

Community Involvement

Lori is actively involved in the Santa Barbara community, serving as a board member of Hospice of Santa Barbara; a member of the Senior Advisory Panel of the Legal Aid Foundation of Santa Barbara; and a member of the Planned Giving Committee for the Fund for Santa Barbara. Lori is also an Adjunct Faculty member of both the University of California at Santa Barbara (Extension Program for Legal Assistantship Certificate Program and The Certified Financial Planners Program) and at the Santa Barbara/Ventura Colleges of Law (Wills and Trusts and Estate Planning).

Practice Areas

- Estate Planning
- Conservatorship and Incapacity Law
- Estate & Trust Litigation
- Post Death Administration
- Tax and Business Planning
- Trust Administration