

NORMA STANLEY

Shareholder

407-418-6467

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Norma Stanley is a shareholder, is board certified in Wills, Trusts & Estates by The Florida Bar and holds a Master of Laws in Taxation. She advises clients on estate planning, federal tax, probate, trust administration, guardianships and elder law.

With more than 25 years of legal experience in wealth transfer, business succession, sophisticated tax, trust and estate planning, estate and trust administration and family office creation, Norma represents a myriad of clients, including high net worth individuals and their families, beneficiaries of trusts and estates, trustees and small business owners.

In addition to providing estate planning, including complex estate planning for high net worth individuals, planning for moderately wealthy individuals, and basic planning for modest, non-taxable estates, Norma also provides estate planning services such as estate, gift and generation skipping transfer tax planning, including family office planning, irrevocable trust planning, grantor retained annuity trusts planning, sales to defective grantor trust planning, qualified personal residence trust planning and charitable planning, including charitable trusts and private foundations, family limited partnerships, business succession planning and asset protection planning.

Norma offers probate and estate administration services which include formal administration and summary (small estate) administration and the preparation and filing of federal estate tax returns (Form 706). Trust administration services include wealth transfer management, trust modifications and providing advice to trustees and other fiduciaries as well as representation of trust beneficiaries.

Additional related services include federal estate and gift tax audit representation and preparation and filing of applications for recognition of exemption related to private foundations (Form 1023).

ADMISSIONS

- Alabama State Bar, 1986
- The Florida Bar, 1988
- U.S. Tax Court, 1991

EDUCATION

- University of Florida Levin College of Law (LL.M in Taxation, 1991)
- The University of Alabama School of Law (J.D., 1986)
- Florida State University (B.S., 1982)

COMMUNITY ACTIVITIES

- Florida Executive Women, past President
- Orlando Shakespeare Theater Advisory Council

RECOGNITION

- Martindale-Hubbell Rating: AV Preeminent
- Listed in Best Lawyers in America 2009-2022
- Listed in the Elder Law and Trusts and Estates Law sections of Best Lawyers in America 2009-2021
- "Lawyer of the Year 2021" for Elder Law by Best Lawyers in America
- Selected for inclusion in Florida Super Lawyers 2011-2020
- Five Star Wealth Manager 2011, 2012
- Top 100 Attorneys of Worth Magazine, 2009
- Listed in the 2007-2008 "Honors Edition" of the Cambridge Who's Who Among Executive and Professional Women
- Legal Section of 2007 Continental Who's Who Registry
- Listed in the 2006-2007 "Honors Edition" of the Madison Who's Who Among Executive and Professionals

PROFESSIONAL CERTIFICATIONS & MEMBERSHIPS

- Board Certified: Wills, Trusts and Estates
- Meritas, Board of Directors 2019-2022
- Chair, U.S. Trust and Estates Practice Group, Meritas Law Firms Worldwide
- Chair, Business Development Committee, Meritas Law Firms Worldwide
- The Florida Bar, Board of Legal Specialization & Education Committee
- The Florida Bar, Ethics Committee
- Past Chair, The Florida Bar, Wills, Trusts and Estates Certification Committee
- Central Florida Estate Planning Council
- Central Florida Association of Women Lawyers
- Orange County Bar Association
- American Bar Association
- National Academy of Elder Law Attorneys
- Academy of Florida Elder Law Attorneys



- Alabama State Bar Association