

JENNIFER C. ERDELYI, J.D., LL.M.
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Jennifer Erdelyi is an AV Preeminent® Peer Review Rated attorney, now working in an advisory role with U.S. Trust clients. Jennifer received her LL.M. degree in Estate Planning in May of 2015, and is a 2005 graduate of the Nova Southeastern University Shepard Broad College of Law.

EXPERIENCE

U.S. TRUST/BANK OF AMERICA PRIVATE WEALTH MANAGEMENT 1/17 to Present
Vice President/Associate Wealth Strategist

- Provides guidance to U.S. Trust clients in the areas of business and estate planning, insurance, risk management, and philanthropy to help clients reach their goals and objectives.
- Coordinates with the client's team of advisors and conducts periodic estate planning reviews and discussions to help educate clients on their planning needs and structuring.

COLODNY FASS, P.A., Fort Lauderdale, FL 02/09 to 12/16
Senior Associate (last position held with firm)

- Performed estate planning, probate and trust administration, corporate, and regulatory services for established base of corporate and insurance industry clients, including high net worth principals.
- Engaged in corporate transactional projects, including drafting and review of tax aspects of agreements and documents related to business entity organization and stock/asset acquisitions and sales.
- Counseled clients regarding diverse business issues, including legal research, analysis, and drafting.
- Facilitated clients' interactions with state agencies regarding regulatory and compliance issues, including communications with regulators and client representation at rulemaking workshops/hearings.
- Drafted, analyzed, tracked and summarized relevant state and federal legislation affecting clients' interests.

JENNIFER C. ERDELYI, P.A., Fort Lauderdale, FL 04/13 to 12/15

- Provided estate planning services, including structuring and drafting of wills, trusts, and advance directives.
- Performed corporate and regulatory legal services on a contract basis to Colodny Fass, P.A.

THE GARDEN CITY GROUP, INC. (GCG), Lake Success, NY (Weston, FL office) 01/07 to 12/08
Legal Services Coordinator

- Conducted legal research related to company's administration of large class action matters.
- Supported company's marketing efforts by analyzing and monitoring status of complex class action litigation.

ALEXANDER A. ERDELYI, P.A., Weston, FL 01/06 to 01/07
Counsel/Business Manager

- Participated in start-up of commercial real estate brokerage, including researching and advising on applicable law and regulations; drafting of organizational documents; and review and drafting of agreements.

RUDEN MCCLOSKEY, Fort Lauderdale, FL 06/04 to 08/04
Summer Associate (Permanent Employment Offer Extended)

- Performed substantive research and writing assignments in various areas of law.

PROFESSIONAL EXPERIENCE PRIOR TO LAW SCHOOL

Marketing and Related Positions With:

- Town of Huntington, NY
- Phase One, Northport, NY
- CA Technologies, Islandia, NY
- Tenet Healthcare, Santa Ana, CA

EDUCATION

UNIVERSITY OF MIAMI SCHOOL OF LAW HECKERLING GRADUATE PROGRAM IN ESTATE PLANNING
LL.M. in Estate Planning, May 2015

NOVA SOUTHEASTERN UNIVERSITY, SHEPARD BROAD COLLEGE OF LAW

Juris Doctor, Magna Cum Laude, May 2005 G.P.A.: 3.55, Class Rank: Top 5%

- Nova Law Review Technical Editor (Board of Editors)
- Goodwin Scholar (full merit scholarship)
- Dean's List, all semesters
- Book Awards (highest grade in class): Wills, Trusts and Estates; Corporations; Arbitration; Lawyering Skills & Values II (legal research and writing)

RUTGERS COLLEGE, RUTGERS UNIVERSITY, *New Brunswick, NJ*

Bachelor of Arts, Communication, May 1990 – Dean's List, Spring 1990

UNIVERSITÀ DI URBINO, *Urbino, Italy*

Study Abroad Program, Summer 1989 - Course work in Italian language, literature, culture and history.

PROFESSIONAL AND COMMUNITY INVOLVEMENT

- Member, Florida Bar, and the Real Property, Probate and Trust Law Section
- Member, Broward County Bar Association and the Probate, Wills, Trusts & Estates Section
- Member, American Bar Association and the Real Property, Trust and Estate Law Section
- Board of Directors, West Broward Estate Planning Council
- Advisory Board, Broward County Women Lawyers' Association (BCWLA - chapter of the Florida Association for Women Lawyers)
- President, Board of Directors, The Meadows Maintenance Association, Inc. (HOA)
- Past President, BCWLA (2015-2016)
- Former Membership Director, Florida Association for Women Lawyers (FAWL) (2017-2018)
- Former Legislative Director, FAWL (2016-2017)
- Former Member, Florida Bar 17th Circuit Grievance Committee B (2011-2014 - Chair in 2014)
- Former Member, Board of Trustees, Fort Lauderdale Children's Theatre (2010-2014)

AWARDS AND RECOGNITION

- AV Preeminent® Peer Review Rated by Martindale-Hubbell
- Broward Lawyers Care Attorney of the Month for March, 2013
- Selected for inclusion in Super Lawyers—Rising Stars Edition 2010

PUBLICATIONS

- *Florida Supreme Court Creates Professionalism Panels*
FAWL Journal (Florida Association for Women Lawyers), Spring 2014 (co-authored)
- *A Taxing Conundrum*
Best's Review, February 2013 (co-authored)
- *State Taxation of Non-U.S. Risk Premium -- An Unintended Consequence of the NRRRA?*
AAMGA Wholesale Insurance News, Summer 2012 (co-authored)
- *Decision Time for Credit Scoring?*
Florida Underwriter Magazine, April 2009 (co-authored)
- *1031 Tenant in Common Exchanges: A "TIC"king Time Bomb at the Intersection of Real Estate, Securities and Tax Law?*
University of Miami Business Law Review, Spring/Summer 2006 (co-authored)
- *The Extraterritorial Application of the Florida Deceptive and Unfair Trade Practices Act*
Nova Law Review, Spring 2004

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