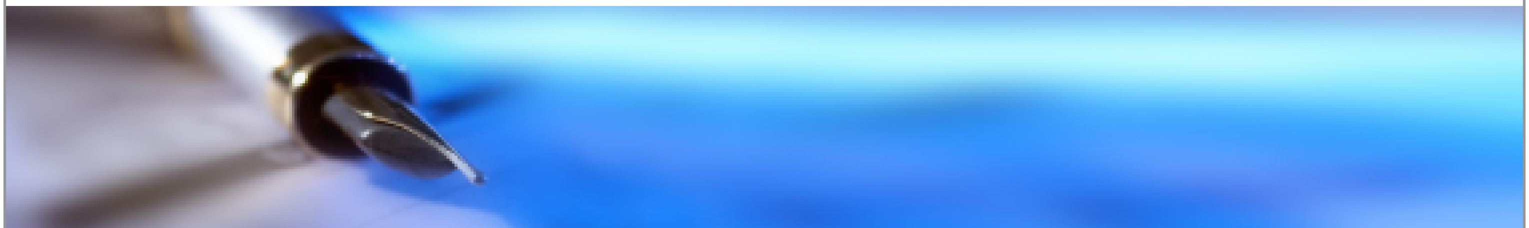
CUMMINGS & LOCKWOOD LLC



STEFANIA L. BARTLETT

Background

Stefania L. Bartlett is Counsel in Cummings & Lockwood's Private Clients Group and is based in the Stamford office. Stefania represents individuals and families in developing comprehensive estate plans, and advises clients on tax and charitable planning. She has experience with estate settlement and trust administration, and represents both beneficiaries and fiduciaries. Stefania represents charitable entities, assisting with their formation, obtaining and maintaining tax-exempt status, and providing advice on administration with respect to grant making, investments and other charitable activities. She also assists individuals in creating charitable giving plans, including advising on gift agreements and split interest trusts. Stefania is member of the Firm's National Charitable Planning Group.

Practice Areas

- Private Clients Group
- Wills, Trusts and Estate Planning
- Probate and Estate Administration
- National Charitable Planning Group
- Philanthropic Giving

Education

- University of Connecticut School of Law (J.D., *with honors*, 2005)
  Connecticut Law Review, Member
- Fairfield University (B.A. in Politics and Economics, *summa cum laude*, 2002) Phi Beta Kappa Society

Bar Admissions

- New York, 2015
- United States Tax Court, 2015
- Connecticut, 2005

Professional Organizations

Stefania L. Bartlett

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- Connecticut Bar Association
- American Bar Association
- Fairfield County Bar Association

Professional Recognition

- Connecticut and New England Super Lawyers, Rising Star, Nonprofit Organizations Attorney, 2018

Articles/Publications

- "Charitable Deductions for Gifts by Individuals, Partnerships and Corporations", *Trusts & Estates Magazine*, October 2018, co-author with Conrad Teitell and Cara Howe Santoro
- Wills: Connecticut, Practical Law Guide, co-author, Thomson Reuters
- Signature Pages for Will and Self-Proving Affidavit, Connecticut, Practical Law Guide, co-author, Thomson Reuters
- "Not Knowing the S Corp Rules Can Be Dangerous to Your Client's Wealth", *Trusts & Estates* Magazine, December 2017, co-author with Conrad Teitell and Cara Howe Santoro
- "Tax Court Disallows Trust's Charitable Deduction For Want of Charitable Intent", T*rusts & Estates* Magazine Website, November 7, 2016, co-author with Andrew M. Nerney
- "U.S. Government Extends Reach as Creditor Beyond the Insolvent Estate, *Trusts & Estates* Magazine Website, September 21, 2016, co-author with Andrew M. Nerney
- "Patching Up Mucked Up CRTs", *Trusts & Estates* Magazine, August 2015, co-author with Conrad Teitell and Patricia R. Beauregard