



**The Estate Planning Council of Cleveland
presents...**

Distinguished Estate Planner 2021

Lisa Roberts-Mamone

Lisa Roberts-Mamone was born in Pittsburgh, Pennsylvania, in 1962. Her mother was from Chicago and trained to be a teacher. Her father was from Parkersburg, West Virginia, where his father was a farmer and grocery store owner. He had a two-year degree in accounting and rose to become the CFO of H.J. Heinz in the 1980s.

Lisa attended public school and remains a loyal Pittsburgh Steeler and Penguins fan to this day. She attended a small undergraduate college two hours north of Pittsburgh called Grove City College, where she got a very good education, a conservative free-market view of the economy, and a very protected start to her social life. She chose to attend Case Western Reserve Law School in Cleveland because she wanted a taste of a city. At Case, she served on the Law Review, and then was an Articles Editor of the Law Review. She was also the Calfee Halter Scholar in 1987.

Lisa was offered a summer job at a law firm she had never heard of - Jones Day - and decided to try it. Right before starting her law career, Lisa married a fellow lawyer, a native Clevelander. She and her husband Ed now reside in Mayfield Heights, where they raised a daughter, Kate, and a son, Christopher. She ended up working at Jones Day from 1988 to 2010. I will let you do that math. She had some wonderful training and learned from some of the best and brightest in Cleveland. She practiced in the Tax Group of Jones Day's Private Wealth Group and became a partner at Jones Day in 2000, one of the very few female partners in Jones Day's Tax Group at that time.

In 2010, Lisa and some other members of her team from Jones Day brought the Cleveland Private Wealth team over to BakerHostetler's Cleveland Estate Planning and Tax team, which already included Oakley Andrews, Rick Lease, Rob Galloway, Kevin Robertson, Jennifer Eschedor and Chad Makuch. Together they created one of the largest estate planning groups in Cleveland. Lisa believes the move to BakerHostetler, which is very interested in retaining its high-profile tax practice and Private Wealth teams in Cleveland and nationwide, is the best home for herself and her clients.

Lisa is experienced in the areas of estate planning and wealth transfer for high-net-worth individuals and families. She provides comprehensive guidance to clients involved in complex trust and estate matters, with a special emphasis on working with family offices and multigenerational families. Lisa is a trusted advisor and counselor to her clients, providing close personal attention and support in difficult situations. She is described as "a great implementer," "exceedingly competent," and "very well thought-of" by sources (Chambers HNW 2018). Lisa has also been involved with several Cleveland charitable organizations, including Case Western Reserve University, University Hospitals, Girl Scouts of North East Ohio, Red Cross of Greater Cleveland, American Cancer Society, College Now, The Laub Foundation, and many more.