



# Lisa

**Lisa M. Montano**  
**Associate**

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## **MY SERVICES**

Private Wealth  
Fiduciary Litigation  
Family Office

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## **EDUCATION**

Saint Louis University School of Law, J.D.  
Hamline University, B.A., *magna cum laude*  
English, Political Science and Psychology

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## **ADMISSIONS**

Illinois  
Missouri

## **overview**

Lisa Montano is an associate in the firm's private client group.

Lisa previously served as a wealth planning strategist for Wells Fargo Advisors where she worked closely with financial advisors and their clients to address all aspects of wealth planning, with an emphasis on educating clients on suitable estate planning strategies to help them achieve their financial goals and objectives. She also coached financial advisors on using available firm planning tools and capabilities to cultivate and strengthen client relationships. Before joining Wells Fargo Advisors, Lisa served as an associate attorney for Waltrip & Schmidt, LLC and Rossiter & Boock, LLC, practicing in the areas of estate planning, probate and trust administration and fiduciary litigation.