



Lisa Rispoli, CPA, AEP, TEP

Partner

Trust & Estate Services Leader

Private Client Services Leader

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Lisa Rispoli is the Partner-in-Charge of Trust & Estate Services at Grassi and leader of the firm's Private Client Services group. She has over 30 years of experience in accounting, estate planning & valuation, as well as gift, estate and trust taxation. Lisa is adept at working with clients and their professional advisors to develop estate plans to transfer family, business and personal wealth to the next generation and charitable organizations. Lisa currently serves as President of the New York City Estate Planning Council.

Lisa assists executors and trustees, providing administration and fiduciary services – including litigation support tax compliance, income tax planning, and court-prescribed accountings. Her expertise in post-mortem planning and compliance guides executors through the complex process of administering estates. Her attention complements her knowledge in these areas to detail and the individual needs and unique financial circumstances of her clients.

Lisa is well recognized as an Estate Accounting Expert by various Surrogate Courts and works closely with many of the Tri-State's leading attorneys. She is recognized by the National Association of Estate Planners & Councils (NAEPC) as an Accredited Estate Planner (AEP). She holds the Trust and Estate Practitioner (TEP) designation from the Society of Trust and Estate Practitioners. Long Island Business News has recognized her as 2023's biggest influencer in accounting, while the Long Island Herald has spotlighted her as a top finalist for the Best Accountant award.

Prior to joining Grassi in 2015, Lisa was the president of her own firm which she founded in 2000 after transitioning from a successful career at a Big 4 firm. Among her many professional and civic accolades, Lisa was recognized by Crain's New York Business among the 2021 Notable Women in Accounting & Consulting. She has been honored by Long Island Business News (LIBN) as one of the Top 50 Women in Business and has appeared in the publication's Who's Who for Women in Professional Services. She was also a 2017 Midas Award recipient, an honor that recognizes individuals who exemplify quality in their professions and communities.

STRENGTH IN CERTAINTY

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Lisa earned her BBA in accounting from Adelphi University and her master's degree in taxation from Long Island University. She is an active member of the New York State Society of CPAs, AICPA, Estate Planning Council of New York City and Nassau County, Columbian Lawyers, and the Westchester Bar Association. She has written for Crain's New York Business, New York Law Journal, Palm Beach Daily News, Newsday, CNN, and Bar Association journals on topics relating to Estate and Trust Planning & Administration. She has served on the Board of Bethany House, an organization that provides emergency shelter and services for women and children. Crain's New York has recognized her in recent years as one of the most Notable Women in Accounting.