

## Julia L. Frey

### SHAREHOLDER

Chair, Private Wealth Services Group

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**Julie Frey** is a shareholder and chair of the Private Wealth Services group. She is board certified by The Florida Bar in Wills, Trusts, and Estates. Her principal areas of practice are estate planning, probate, trust administration, guardianship, and elder law.

Julie counsels a broad range of clients, including professional athletes, high net worth clients with needs for sophisticated estate planning techniques, physicians, and clients who have specific needs with respect to asset protection and business succession matters. She works closely with clients to understand their goals and help them plan how to minimize or avoid wealth transfer taxes.

When working with clients, Julie helps her clients plan to minimize or avoid whether transfer taxes are consistent with the clients goals. Techniques that Julie frequently employs include wills, revocable and irrevocable trusts, family limited partnerships, limited liability companies, grantor retained annuity trusts (GRATs), sales to intentionally defective trusts, charitable trusts, charitable foundations, lifetime gift planning and generation-skipping transfer tax planning.

Julie often represents trustees and personal representatives in their administration of trusts and estates. At other times, she assists beneficiaries with the enforcement of their rights in an estate and/or trust proceeding. She also represents parties with respect to trust construction matters and will contests with the firm's litigation group.

### Recognitions

- Martindale-Hubbell AV Preeminent Peer Review Rated
- Best Lawyer in America for Trust & Estates Law, *The American Lawyer*
- *The Best Lawyers in America* guide, Trusts and Estates, 2005-2024
- Florida *Super Lawyers*, 2006-2023
- *Awesome Attorneys*, *Orlando Family Magazine*, 2023

### Practices & Industries

- Estate Planning
- Wills & Trusts
- Family Business & Succession Planning
- Estate & Trust Administration
- Charitable Planning
- Private Wealth
- Wealth Planning
- Tax
- Intellectual Property

### Admissions

- Florida
- District of Columbia
- U.S. Supreme Court

### Education

- University of Florida Levin College of Law, J.D., 1982
- Duke University, A.B., 1979; English

- *The Best Lawyers in America* guide, Orlando Trusts and Estates Lawyer of the Year, 2013
- Top 50 Female Attorneys, *Super Lawyers*, 2006, 2014
- Florida Legal Elite, *Florida Trend*, 2006–2009
- Florida's Top Lawyers, *Florida Monthly Magazine*, 2006
- Central Florida Women of the Year, Women's Executive Council, 2005
- Outstanding Women of Orlando Award, PACE Center for Girls, 2000
- "40 under 40" Award, *Orlando Business Journal*

## Community Activities

- The Lou Frey Institute on Government and Politics at the University of Central Florida, Board, 2003–present; Chair
- Rollins Museum of Art, Board of Visitors
- Florida Executive Women
- Central Florida Estate Planning Council
- WMFE Board of Trustees, Past Chair
- American Red Cross Central Florida, Past Chair
- St. John Lutheran Church

## Professional Certifications & Memberships

- The Florida Bar, Board of Governors, Ninth Judicial Circuit Representative
- The Florida Bar Board Certified: Wills, Trusts and Estates - 1996–present
- Orange County Bar Association, Past President
- Central Florida Association for Women Lawyers, Past President
- The Florida Bar, Probate Rules Committee
- American Bar Association
- National Association for Elder Law Attorneys

## News

Best Lawyers Recognizes 49 Lowndes Attorneys in 2024, Three Named Lawyer of the Year  
08.17.2023 | AWARDS & RECOGNITION

13 Lowndes Attorneys Named 2023 Florida Super Lawyers and Rising Stars  
06.26.2023 | AWARDS & RECOGNITION

14 Lowndes Attorneys Named to *Orlando Family Magazine's* "Awesome Attorneys 2023"  
02.21.2023 | AWARDS & RECOGNITION

46 Lowndes Attorneys Recognized by *Best Lawyers* in 2023  
08.18.2022 | AWARDS & RECOGNITION

Julie Frey Reappointed to The Florida Bar Board of Governors  
07.19.2022 | PRESS RELEASE

19 Lowndes Attorneys Named 2022 Florida Super Lawyers and Rising Stars  
07.05.2022 | AWARDS & RECOGNITION

14 Lowndes Attorneys Named to *Orlando Family Magazine's* "Awesome Attorneys 2022"  
02.15.2022 | AWARDS & RECOGNITION

Julia Frey, Norma Stanley Recognized in 2022 Best Lawyers: Family Law Publication  
12.20.2021 | AWARDS & RECOGNITION

Best Lawyers Recognizes 44 Lowndes Attorneys in 2022, Five Named Lawyer of the Year  
08.19.2021 | AWARDS & RECOGNITION

Best Lawyers Recognizes 44 Lowndes Attorneys in 2021, Two Named Lawyer of the Year  
08.20.2020 | AWARDS & RECOGNITION

22 Lowndes Attorneys Named 2020 Florida Super Lawyers and Rising Stars  
06.04.2020 | AWARDS & RECOGNITION

Forty-Three Lowndes Lawyers Earn Recognition in Best Lawyers in America 2020  
08.15.2019 | AWARDS & RECOGNITION

29 Lowndes Attorneys Named 2019 Florida Super Lawyers and Rising Stars  
05.29.2019 | AWARDS & RECOGNITION

Forty-Four Lowndes, Drosdick, Doster, Kantor & Reed Lawyers Earn Recognition in 2019 Best Lawyers in America  
08.15.2018 | AWARDS & RECOGNITION

Lowndes, Drosdick, Doster, Kantor & Reed Attorneys Rated 2018 Super Lawyers and Rising Stars  
06.18.2018 | AWARDS & RECOGNITION

Forty-Nine Lowndes, Drosdick, Doster, Kantor & Reed Lawyers Earn Recognition in 2018 Best Lawyers in America  
08.15.2017 | AWARDS & RECOGNITION

Lowndes, Drosdick, Doster, Kantor & Reed Attorneys Rated 2017 Super Lawyers and Rising Stars  
06.01.2017 | AWARDS & RECOGNITION