

James A. Ballerano, Jr.

Of Counsel

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Overview

James "Jim" Ballerano represents business owners, executives, entrepreneurs, retirees and families in their estate planning and wealth preservation matters. He works with clients to accomplish the preservation and efficient transfer of their wealth, including advising and assisting clients in estate planning and the administration of estates and trusts.

Jim also advises individuals and entities, including family offices, in the acquisition, management, improvement, financing and disposition of real estate holdings. In relation to these matters, he assists clients with strategies to address their needs and to resolve any issues that may arise.

Jim is actively involved in leadership positions in the community and his church. Currently, he is the Hospitaller and Knight of Grace of the American Priory, Florida Commandery, Order of St. John of Jerusalem, Knights Hospitaller, Malta, and Vice President of Field Events of the Rod & Gun Club of Florida. He serves on the professional advisory committees of the Community Foundation of Palm Beach and Martin Counties and the George Snow Scholarship Fund. He also recently served as Director Emeritus and Past President of the Greater Boca Raton Estate Planning Council; an Executive Board Member and President of the Boca Raton Historical Society & Museum; and as a member of the professional advisory committees of the Jewish Federation of South Palm Beach County, the Anti-Defamation League, the United States Holocaust Museum and the Boca Raton Museum of Art.

He is an active steward at St. Mark Greek Orthodox Church, and a member of The Archbishop Iakovos Leadership 100 Endowment Fund, Inc.

Firm Leadership:

- Office Managing Partner, Boca Raton

Practices & Industries

Family Office

Private Client

Residential Real Estate

Trust & Estates

Education and Credentials

Education

University of Miami School of Law, J.D., *cum laude*

Stony Brook University, B.A.

Admissions

DAY PITNEY LLP

State of Florida

State of New York

Affiliations

Greater Boca Raton Estate Planning Council, Past President and Director Emeritus

Accredited Estate Planner (AEP)

Recognition and Community

No aspect of this advertisement has been approved by the highest court of any state. Prior results do not guarantee a similar outcome. See Awards Methodology.

Recognitions

Recognized by the *Daily Business Review* with a Lifetime Achievement Award as part of their Florida Legal Awards program, which recognizes professionals for having a significant impact on the practice of law in Florida over a notable legal career, 2024

Chosen for inclusion in *The Best Lawyers in America* (Woodward/White, Inc.), Trusts and Estates, 2023-2027

Selected to the Top Lawyers list in the Wills category by the *Boca Raton Observer* (A&A Publishing Corp) and DataJoe, 2022-2023

Community Involvement

Community Foundation for Palm Beach and Martin Counties, Philanthropic Advisory Council

South Palm Beach County Estate and Tax Roundtable

Delray Beach Estate and Tax Roundtable

Boca Raton Historical Society, Board of Directors, Executive Board Member and Immediate Past President

Hospitaller and Knight of the American Priory, Order of St. John of Jerusalem, Knights Hospitaller, Malta

Boca Raton Museum of Art, Professional Advisory Committee

Community Foundation of Palm Beach and Martin Counties, Professional Advisor Network

George Snow Scholarship Fund, Professional Advisory Committee

Jewish Federation of South Palm Beach County, Professional Advisory Committee

Anti-Defamation League, Professional Advisory Committee

United States Holocaust Museum, Professional Advisory Committee

St. Mark Greek Orthodox Church, Liturgical Choir, former Parish Council President

Rod & Gun Club of Florida, Field Events Chairman

The Schmidt Family Center for the Arts, former Vice Chair, Board of Directors

Boca Raton Symphonia, former Member, Board of Directors

Delray Beach Chamber of Commerce, Chairman's Circle

Insights

Day Pitney Sponsors 18th Annual Festival of the Arts BOCA
March 1, 2024

Day Pitney Hosts Thought-Provoking Palm Beach Family Office Forum
May 19, 2023

Day Pitney Supports 16th Annual Festival of the Arts BOCA
March 25, 2022

COVID-19 Impact on Tax Filings in Florida
April 28, 2020

COVID-19 Impact on Extended Property Tax Payment Due Date in Florida
April 6, 2020

COVID-19 Impact on Real Estate Deed Recordings in Florida
April 6, 2020

COVID-19 Impact on Tax Filings in Florida
April 2, 2020

COVID-19 Impact on Annual Report Filings Due Date for Corporations and Other Entities in Florida
April 2, 2020

Additional Takeaways From the Latest Qualified Opportunity Fund Regulations
April 30, 2019

IRS Releases Second Set of Proposed Regulations Regarding Qualified Opportunity Funds
April 22, 2019

News

James Ballerano Receives Founder's Award at Philanthropic Advisory Council Kickoff
October 9, 2026

Day Pitney Widely Recognized by Daily Business Review at the Florida Legal Awards
April 5, 2024

Three Day Pitney Partners Named by Daily Business Review as 2024 Florida Legal Awards Honorees
February 2, 2024

Day Pitney Relocates Boca Raton Office
September 27, 2021

Day Pitney Further Expands Presence in Florida Through Merger with Richman Greer
October 29, 2018

Day Pitney and Chapin, Ballerano & Cheslack Close Merger
January 1, 2016

In The Media

Professional Advisor Spotlight with James A. Ballerano: How Philanthropy Helps Establish Florida Residency
Community Foundation for Palm Beach and Martin Counties, December 4, 2024

2024 Family Wealth Advisors Interchange, Raymond James
March 21, 2024

Lifetime Achievement: James A. Ballerano Jr.
Daily Business Review, March 1, 2024

Top Lawyers in 2023
Boca Raton Observer, August 30, 2023

Top Lawyer 2022; Boca Raton Observer
Boca Raton Observer, September 2022

"2022 Family Wealth Advisors Interchange, " Raymond James
June 9-10, 2022

Family Office Association Palm Beach Investment Forum
March 16, 2016

Society Scene: Festival of the Arts
Sun Sentinel, March 3, 2016