



James Ballerano, Jr.

Partner

Boca Raton, FL

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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.

SERVICES

TRUSTS AND ESTATES

FAMILY OFFICE

RESIDENTIAL REAL ESTATE

PRIVATE CLIENT

INDUSTRIES

REAL ESTATE AND ENVIRONMENTAL

COMMERCIAL REAL ESTATE AND DEVELOPMENT TRANSACTIONS

CONSTRUCTION

REAL ESTATE REDEVELOPMENT

ENVIRONMENTAL AND LAND USE

INSIGHTS

"2022 FAMILY WEALTH ADVISORS INTERCHANGE, " RAYMOND JAMES

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

COVID-19 IMPACT ON TAX FILINGS IN FLORIDA

Co-author, April 28, 2020, *Day Pitney Advisory*

COVID-19 IMPACT ON TAX FILINGS IN FLORIDA

Co-author, April 2, 2020, *Day Pitney Advisory*

FAMILY OFFICE ASSOCIATION PALM BEACH INVESTMENT FORUM

Speaker, March 16, 2016

NEWS

TOP LAWYER 2022; BOCA RATON OBSERVER

Featured, September 2022, *Boca Raton Observer*

DAY PITNEY SUPPORTS 16TH ANNUAL FESTIVAL OF THE ARTS BOCA

Quoted, March 25, 2022, *Florida Bar News*

DAY PITNEY RELOCATES BOCA RATON OFFICE

Quoted, September 27, 2021, *Day Pitney Press Release*

DAY PITNEY FURTHER EXPANDS PRESENCE IN FLORIDA THROUGH MERGER WITH RICHMAN GREER

Quoted, October 29, 2018, *Day Pitney Press Release*

SOCIETY SCENE: FESTIVAL OF THE ARTS

Featured, March 3, 2016, *Sun Sentinel*

EDUCATION AND CREDENTIALS

EDUCATION

University of Miami School of Law, J.D., TEST

Stony Brook University, B.A., TEST

ADMISSIONS

State of Florida

State of New York

AFFILIATIONS

Greater Boca Raton Estate Planning Council

Accredited Estate Planner (AEP)

RECOGNITION AND COMMUNITY

RECOGNITION

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

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

No aspect of these advertisements have been approved by the highest court of any state. See [Awards Methodology](#).

COMMUNITY

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