

**Marguerite Lorenz, CTFA, CLPF#319**

Master Trustee · Managing Partner

Lorenz Private Trustees

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Since 2003, Ms. Lorenz has been managing partner in Lorenz Private Trustees (MyTrustee.net), and has served as a Professional Trustee and Executor on over 100 cases. Ethics for Trustees (Amazon), written by Jane and Marguerite Lorenz, gives further understanding to the work of a Fiduciary, and its ethical considerations. She is passionate about her work and is so grateful for her partners, work mates, colleagues and clients.

She serves as Vice-Chair of the Board for the Independent Trustee Alliance. [TrusteeAlliance.com](http://TrusteeAlliance.com)

As President of the Estate Planning Group Network she works to strengthen the estate planning community to improve client outcomes everywhere. [EstatePlanningGroups.com](http://EstatePlanningGroups.com)

Marguerite is a California Licensed Professional Fiduciary (#319), a Certified Trust and Financial Advisor (CTFA) #87097, a Master Certified Independent Trustee through the ITA and has been awarded Certification through the Institute of Certified Bankers/American Bankers Association. She is a Graduate of the National Trust School, American Bankers Association at Northwestern University. Follow Ms. Lorenz on Twitter! @SanDiegoTrustee