



## Deirdre R. Wheatley-Liss

### Principal

Morristown, NJ | New York, NY

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Deirdre Wheatley-Liss is a trusted advisor to families, business owners, and non-profit leaders who want to protect what they've built—empowering families and business owners to build legacies with clarity, confidence, and care. With over 25 years of experience, she helps clients preserve wealth, minimize taxes, navigate complex transitions, and implement legal strategies that reflect their values and goals.

#### **For Business Owners**

Deirdre serves as a legal and strategic partner to business owners throughout the life of their companies—from formation and growth to succession or sale. As a tax attorney, she understands that every business has a silent partner—the IRS—and works proactively to reduce its share. She advises clients on entity selection, operating and shareholder agreements, M&A, exit planning, and business succession, including family business transitions and partner breakups.

Her practical, business-minded approach has helped clients save hundreds of thousands of dollars through efficient legal structures and tax-smart planning. Deirdre is a sought-after national speaker on business law, tax strategy, and exit planning.

#### **For Families and Individuals**

Whether creating an estate plan, navigating aging and incapacity, or addressing the needs of a family member with special needs, Deirdre guides her clients with clarity and compassion. She crafts customized plans that protect assets from taxes, long-term care costs, family disputes, and other threats—while preserving family harmony.

Her services include wills and trusts, elder law and long-term care planning, guardianships, estate and trust administration, and representing clients in contested estate matters. Her goal is to empower clients with knowledge, so they can make confident decisions that align with their values.

#### **For Non-Profit Organizations**

Non-profit leaders rely on Deirdre for practical guidance that blends legal compliance with mission focus. She advises educational institutions, family foundations, and charitable organizations on formation, governance, tax compliance, and strategic giving. She helps clients meet IRS requirements while advancing their vision for community impact.

#### **Thought Leadership and Credentials**

## Deirdre R. Wheatley-Liss Cont.

Deirdre is a nationally recognized speaker and educator on estate planning, elder law, and business succession. She is the author of Plan Your Own Estate and contributes regularly to articles, blogs, and video content.

She holds an LL.M. in Taxation and is a Certified Elder Law Attorney (CELA), accredited by the National Elder Law Foundation and American Bar Association. Fewer than 100 attorneys in New Jersey hold this distinction.

## Recognitions

*No aspect of this or any advertisement has been approved by the Supreme Court of New Jersey. For ranking methodologies, please see [here](#).*

- *The Best Lawyers in America*® – Corporate Law (2025 and 2026); Elder Law (2025 and 2026); Trusts and Estates (2025 and 2026)
- New Jersey Super Lawyers® (2023-2025)
- *NJBIZ* - Leaders in the Law (2022)
- New Jersey Rising Stars® (2009 and 2010)
- *NJBIZ* - Top 50 Women in Business (2009)
- *NJBIZ* - 40 Under 40 (2008)
- Certified Elder Law Attorney (CELA) by the ABA Accredited National Elder Law Foundation
- Tri-County Scholarship Fund - Women of Achievement Award (2014 and 2015)

## Memberships

Deirdre actively contributes to both the professional and local community:

- Morris County Chamber of Commerce - Member, Board of Directors; Past Chair (2023-2024), Vice-Chair (2021 - 2022); Women in Business
- National Academy of Elder Law Attorneys (NAELA) - Member, Board of Directors; Chair, Tax Steering Committee; Board of Directors, NJ Chapter
- Morris County Bar Association - Co-Chair, Tax, Trust, Estate & Elder Law Committee; Co-Chair, Elder Law Committee
- Estate Planning Council of Northern New Jersey - Past President, Board of Directors
- New Jersey State Bar Association - Past Chair, Cybersecurity Committee
- New York Bar Association
- Legal Advisor to numerous nonprofit organizations across NJ and NY

## News

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## Deirdre R. Wheatley-Liss Cont.

- Porzio Advises First Children Services on Strategic Growth Partnership , 10/08/2025
- 27 Porzio Attorneys Recognized in *The Best Lawyers in America*® 2026 Edition; 6 Listed as *Best Lawyers: Ones to Watch*®, 8/21/2025
- Deirdre Wheatley-Liss Appointed to Board of Directors of the National Academy of Elder Law Attorneys, 6/02/2025
- Porzio, Bromberg & Newman Becomes Designated Custodian of Stroock & Stroock & Lavan LLP's Estate Planning Documents, 5/07/2025
- 19 Porzio Attorneys Named to 2025 New Jersey Super Lawyers® and Rising Stars® Lists, 3/20/2025
- 26 Porzio Attorneys Recognized in *The Best Lawyers in America*® 2025 Edition; 6 Listed as *Best Lawyers: Ones to Watch*®, 8/15/2024
- 18 Porzio Attorneys Named to 2024 New Jersey Super Lawyers® and Rising Stars® Lists, 3/25/2024
- Twenty Porzio Attorneys Recognized in 2023 New Jersey Super Lawyers and Rising Stars Lists, 5/11/2023
- Porzio's Deirdre Wheatley-Liss Named Chair of Morris County Chamber of Commerce's Board of Directors , 1/19/2023
- Congratulations to Principal Deirdre Wheatley-Liss for Being Named by NJBIZ as a 2022 Leaders in the Law Honoree , 5/24/2022
- Porzio Bromberg & Newman, P.C. Principal Deirdre Wheatley-Liss Named to Morris County Chamber of Commerce Board of Directors, 3/11/2021
- Porzio's Family of Companies Receive Community Impact Award, 11/22/2019
- Elder Law Attorney Deirdre Wheatley-Liss has Accepted a Position on the InterActive Legal Advisory Board, 6/24/2019
- Deirdre Wheatley-Liss Honored by Executive Women of New Jersey (EWNJ), 5/09/2018
- Principal Deirdre Wheatley-Liss' Elder Law Event Covered by the Daily Record, 7/29/2017
- Principal Deirdre Wheatley-Liss Presented on New Jersey Estate Planning and Basic New Jersey Estate Administration, 11/22/2016
- 8th Annual Porzio Employment Law Forum, 11/15/2016
- Porzio Business Owners Symposium Series: What Happens When You No Longer "Like" Your Employees, 10/21/2016
- Porzio Business Owners Symposium Series: Cyber Liability, 8/19/2016
- Deirdre Wheatley-Liss Named as a Member of the Tax Section Steering Committee of the National Association of Elder Law Attorneys, 9/17/2015
- Deirdre Wheatley-Liss Nominated as a Director of the Estate Planning Council of Northern New Jersey, 5/19/2015

## Articles

- The "Big Beautiful Bill" Is Law: What It Means for Your Tax, Estate, and Business Planning, 7/07/2025

## Deirdre R. Wheatley-Liss Cont.

- Quarterly Tax Updates: Timely Takeaways on IRS Audits, Art, Aircraft & Estate Planning, 6/18/2025
- The Accidental Art Collector: Income and Estate Tax Considerations, 6/18/2025
- Use of Private Aircraft: Has the IRS Become Your Copilot, 6/18/2025
- Corporate Transparency Act Filings Reinstated – BOI Reports Due By March 21, 2025, 2/20/2025
- Quarterly Tax Updates: Key Insights on IRS Developments, Crypto, Estate Planning & More, 2/11/2025
- Supreme Court Petition Filed to Reinstate Corporate Transparency Act (CTA) Enforcement, 1/08/2025
- Fifth Circuit Vacates Stay of Preliminary Injunction Against CTA Enforcement, 12/30/2024
- Fifth Circuit Reinstates Corporate Transparency Act's January 13, 2025 Filing Deadline, 12/24/2024
- 2024 Year-End Tax Planning: It's Not Too Late, 12/19/2024
- Texas Court Halts Corporate Transparency Act: What This Means for Your Business, 12/09/2024
- Navigating the Corporate Transparency and New York LLC Transparency Acts: A Guide for Trust and Estates Attorneys - *New York Law Journal*, 10/21/2024
- Federal District Court Rules Corporate Transparency Act Unconstitutional, Only Enjoins Actions Against Plaintiffs: What's Next, Given You Weren't a Plaintiff?, 3/07/2024
- Quarterly Tax Updates: January 2024, 1/16/2024
- Corporate Transparency Act Becomes Operational, 1/16/2024
- 7 Things to Know About the Corporate Transparency Act, 12/28/2023
- Year-End Tax Tips: 5 Smart Strategies for 2023, 3 Important Changes for 2024, 12/14/2023
- 2023 Q3 Tax Updates, 7/20/2023
- Lessons from the Lynnette Harris and Leigh Ann Conley Cases, 7/20/2023
- Tax Short Shorts, 7/20/2023
- Net Unrealized Appreciation: Opportunities in Your Company's Retirement Plan, 7/20/2023
- More IRS Scrutiny of Hobby Losses, 7/20/2023
- Retirement Report, 7/20/2023
- Qualified Small Business Stock: More Smoke than Fire, 7/20/2023
- 2023 Q2 Tax Updates, 4/27/2023
- A Look At President Biden's Budget Tax Proposals, 4/27/2023
- Crypto Corner, 4/27/2023

## Deirdre R. Wheatley-Liss Cont.

- Golden Passports & Moving to Puerto Rico, 4/27/2023
- Tax Shorts, 4/27/2023
- 2023 Q1 Tax Updates, 1/24/2023
- IRS Delays \$600 Reporting Threshold, 1/24/2023
- The Far Side, 1/24/2023
- The Silver Lining of Inflation, 1/24/2023
- Understanding the Once-A-Year Rollover Rule, 1/24/2023
- 2022 Year-End Tax Planning , 12/13/2022
- The Complexity of Charitable Contributions, 12/13/2022
- Converting Traditional IRAs to Roth IRAs, 12/13/2022
- Crypto Investments, 12/13/2022
- Delaying Income and Accelerating Expenses, 12/13/2022
- Looking Ahead: Tax Rates, Gift & Estate Exemptions and Tax Legislation, 12/13/2022
- Should You Harvest Losses?, 12/13/2022
- Federal Tax Changes: The Time to Plan Is Now, 4/01/2021
- New Estate and Gift Taxes on the Way?, 3/30/2021
- Attorneys' Ethical Obligation in the Event of a Data Breach, June 2020
- SBA Payment Protection Program Loans - Use Of Proceeds And Loan Forgiveness, 4/02/2020
- SBA - Paycheck Protection Program Guidance, 4/02/2020
- Paycheck Protection Program Application Process, 4/02/2020
- Trust & Estate Planning During COVID-19: 10 Answers to Client Questions, 3/26/2020
- Operation of Law Practice in the Event of Death or Disability, 10/18/2019
- SECURE Act and RESA - Significant Changes Expected to Retirement Planning, 6/03/2019
- Does Your Grantor Trust Still Make Sense?, 3/01/2019
- Using NINGs to Save New Jersey State Income Taxes, 1/07/2019
- Planning for Special Needs Children in a Divorce, 7/19/2018
- 2017 Year-End Planning Update, 12/13/2017
- Market Like A Girl, 11/10/2016

## Deirdre R. Wheatley-Liss Cont.

### Events

- On-Demand Webinar - Securing Futures: The Impact of the One Big Beautiful Bill Act, 8/13/2025
- Porzio's Seventh Annual Ethics & Eggs, 12/07/2023
- New Jersey Employer Action Guide, 4/14/2020
- Porzio Principal Deirdre Wheatley-Liss and PorzioCS Vice President Jim Mottola Present at MCBA Legalpalooza, 10/18/2019
- Porzio Principals to Present at the NJCPA Bergen and Hudson Chapters' Annual Tax Seminar, 11/04/2017
- Porzio Principals Presented at CBI's Data Privacy Summit for Life Sciences, 10/30/2017
- Principal Deirdre Wheatley-Liss Presenting to Insurance Professionals on Cybersecurity Best Practices, 10/27/2017
- Principal Deirdre Wheatley-Liss Presented at the Alzheimer's New Jersey Caregiver Conference, 7/29/2017
- Principal Deirdre Wheatley-Liss Spoke at the Executive Women's Leadership Breakfast, 5/11/2017
- Porzio Business Owners Symposium Series: Managing Strategic Partnerships/Joint Ventures, 4/07/2017
- Porzio Attorneys Deirdre Wheatley-Liss and Richard Ploss Presented "Estate Planning for Unusual Assets", 2/07/2017
- Principal Deirdre Wheatley-Liss to Speak at the NJICLE Program on Will Writing, 12/19/2016
- Porzio Attorneys To Present During ASAH Workshop, 12/15/2016
- Porzio Principal Deirdre Wheatley-Liss to Speak at NJICLE Program "Let's Write A Will: 2016 Update", 12/12/2016
- Porzio Principals Present at the NJICLE 2016 Cyber Security Conference, 12/12/2016
- Porzio Principal Deirdre Wheatley-Liss to Speak at NJCPA Essex Chapter Seminar, "Social Security and Elder Law Taxation", 12/09/2016
- Deirdre Wheatley-Liss and Kerri Wright to present at NJCPA Annual Tax Seminar, 11/19/2016
- Principal Deirdre Wheatley-Liss to Moderate the NJICLE Program "A Lawyer's Guide to Estate Planning", 11/17/2016
- Principal Deirdre Wheatley-Liss Will Moderate the NJICLE Program "Advanced Estate Planning in 2017 & Beyond", 11/17/2016
- Deirdre Wheatley-Liss to Speak at NJICLE Seminar on Advanced Estate Planning, 11/16/2016
- Principal Deirdre Wheatley-Liss Presents to the New Jersey Collaborative Law Group, 10/18/2016
- Porzio Attorneys Deirdre Wheatley-Liss and Richard Ploss Co-Presented a Seminar on Estate Planning for Digital Assets, 10/04/2016
- Deirdre Wheatley-Liss to Speak at B.I.G.'s Special Empowerment Event Series, 9/20/2016
- Principal Deirdre Wheatley-Liss to Present on The Financial Impact of a Data Breach, 9/20/2016

## Deirdre R. Wheatley-Liss Cont.

- Principal Deirdre Wheatley-Liss to Present NJCPA Session on Elder Law Taxation, Guardianships and Estate Planning, 9/02/2016
- Porzio Principals Speak at the 2016 Cyber Security Conference, 6/14/2016
- Deirdre Wheatley-Liss Presented Webinar on Current Issues, Trends and Approaches for Long Range Care Planning, 5/17/2016
- Porzio Business Owners Symposium Series: Changes Affecting Business Utilization of Independent Contractors, 4/15/2016
- Deirdre Wheatley-Liss Co-Presented a Webinar For Transitions in Business Ownership, 3/21/2016
- Porzio Principal Deirdre Wheatley-Liss Honored by Tri-County Scholarship Fund with 2015 Women of Achievement Award, 3/20/2015

## Speaking Engagements

- "Understanding The One Big Beautiful Bill Act," New York Women's Bar Association, 10/29/2025
- "Big, Bold & Billable: What the One Big Beautiful Bill Means for Elder Law Attorneys," National Academy of Elder Law Attorneys (NAELA) Webinar, 8/21/2025
- "Irrevocable Income-Only Trusts," National Academy of Elder Law Attorneys (NAELA) Annual Conference, 5/07/2025
- "Mid-Wealth Estate Planning – Planning for the Rest of Us," Interactive Legal Speaker Series, 3/05/2025
- "IRS Investigations and Targeting ACT 60 Recipients: Planning and Prevention," Porzio's Puerto Rico Legal & Compliance Summit, 2/04/2025
- "Wealth preservation fundamentals and opportunity costs. Intro to crypto Trusts and Estates - what you need to know," BUIDL Here Conference, Puerto Rico Blockchain Trade Association, 2/04/2025
- "Beyond Ownership: Strategic Succession Planning for Closely Held Businesses," Porzio's Wealth Preservation Symposium, 1/29/2025
- "Scrambling for Answers: Navigating Ethics in the Age of Emerging Tech," Porzio's 8th Annual Ethics & Eggs CLE Seminar, 12/05/2024
- "Navigating the Corporate Transparency Act and New York LLC Transparency Act – Practical Considerations," CELESQ, 11/26/2024
- "SECURE Act 2.0 and Important Tax Updates for 2025," East Bay Trust & Estates Lawyers Fifteenth Annual Lunch, 11/15/2024
- "The IRS Is At It Again!," 2024 National Conference on Special Needs Planning and Special Needs Trusts, 10/16/2024
- "Orange is the New Tax," 16th Annual Porzio Employment Law Forum, 10/01/2024
- "Washington Update," Estate Planning Council of Northern New Jersey, 9/27/2024

## Deirdre R. Wheatley-Liss Cont.

- "Corporate Transparency Act - Law and Compliance," Greater Middlesex Somerset County Estate Planning Council, 9/19/2024
- "Corporate Transparency Act," New Jersey State Bar Association, 2024 Elder and Disability Law Symposium, 9/10/2024
- "Corporate Transparency Act (for all LLCs, Corporations, and LPs) Are the clients in compliance, and are you?" National Academy of Elder Law Attorneys (NAELA) Online Annual Conference, 9/04/2024
- "Dealing with IRS Criminal Enforcement and Tax Issues in Divorce," Academy for Continuing Professional Education, 9/03/2024
- "Corporate Transparency Act (for all LLCs, Corporations, and LPs) Are the clients in compliance, and are you?" National Academy of Elder Law Attorneys (NAELA) Annual Conference, 5/03/2024
- "The IRS, New Trust Modifications, and Tax Consequences," National Academy of Elder Law Attorneys, 3/28/2024
- "Organizational Management Issues, Reputational Risks, and Creating a Purposeful Corporate Culture," Porzio's Seventh Annual Ethics & Eggs CLE Seminar, 12/07/2023
- "Revenue Ruling 2023-2: Setting the Record Straight," National Academy of Elder Law Attorneys (NAELA), 11/14/2023
- "Retool Your Practice – Will Drafting Fundamentals," New Jersey State Bar Association, 11/09/2023
- "The Tax "Ins and Outs" of Gifting," Tax Intensive - Stetson Law 2023 National Conference on Special Needs Planning and Special Needs, 10/18/2023
- "Income Tax Considerations for the Year of Death," Tax Intensive - Stetson Law 2023 National Conference on Special Needs Planning and Special Needs, 10/18/2023
- "Cool Tips & Tricks to Help Your Clients Save on Taxes and Increase Your Bottom Line," 2023 National Academy of Elder Law Attorneys Summit , 3/10/2023
- "Wage Issues in the Modern Economy," Porzio Employment Law Forum, 11/02/2022
- "A Whole New World - Taxation of Cryptocurrency and Other Digital Assets," Stetson's Annual National Conference on Special Needs Planning and Special Needs Trusts, 10/12/2022
- "No Kidding – the "Kiddie Tax" Bites," Stetson's Annual National Conference on Special Needs Planning and Special Needs Trusts, 10/12/2022
- "Medicaid 201: Planning for Long Term Care Costs," Porzio Webinar, 4/09/2021
- "Medicaid 101: When You Need Long Term Care," Porzio Webinar, 3/12/2021
- "When You Are Suddenly Alone – The First Year Following Change," Porzio Webinar, 2/12/2021
- "Clutter Clearance and Financial Housekeeping – Supporting Wellbeing and Aging in Place," Porzio Webinar, 1/08/2021
- "Memory Issues in Aging – Medical and Legal Perspectives," Porzio Webinar, 12/11/2020
- "Planning for Parents of Gen Z" Porzio Webinar, 11/13/2020



## Deirdre R. Wheatley-Liss Cont.

- Speaker, "CEOs, Wives, Mothers, Daughters: Legal Planning for Our Roles in Life," New Jersey Business Association's Women Business Leaders Council, 10/23/2020
- "Medicare 101: Maximizing Your or Your Loved One's Health Care in Retirement?" Porzio Webinar, 10/09/2020
- "Protecting your Assets, Wealth Planning and Charitable Giving," Webinar, Montclair State University, 9/16/2020
- "What does a Trustee REALLY do?" Porzio Webinar, 9/11/2020
- "Supporting An Aging Loved One – The Intersection of Elder Care and Elder Law", Porzio Webinar, 8/14/2020
- "Graying Marriage and Divorce: Special Considerations for Marriage and Divorce Over 60", Porzio Webinar, 7/10/2020
- "Will Drafting Fundamentals", NJICLE Webcast, 4/29/2020
- "New Jersey Employer Action Guide," Morris County Chamber Of Commerce Webinar, 4/14/2020
- "GDPR and Ethical Considerations Related to Privacy," Ethics & Eggs, Porzio, Bromberg & Newman, P.C., 11/22/2019
- "Best Practices In Managing Vendor Access To Confidential Data," Porzio Employment Law Forum, 10/03/2018
- "Estate Planning for Unusual Assets," and "Multi-Jurisdiction Estate Planning," NJICLE, Summer CLEfest- Tax & Estate Planning Track, 8/10/2018
- "Hot Topics: Sexual Harassment in the Workplace," NJCPA Webinar, 7/12/2018
- "Sexual Harassment," Morris County Chamber of Commerce Not For Profit Roundtable, 6/21/2018
- "Data Privacy & CyberSecurity: Practical Steps to Protect Your School," New Jersey Association of School Administrators, 5/23/2018
- "A Lifetime of Support: Planning for a Family Member Who Has Special Needs," Randolph Township Library, 2/06/2018
- "New Employment Regs." NJCPA Bergen and Hudson Chapters, Annual Tax Seminar, 11/04/2017
- "Managing Strategic Partnerships/Joint Ventures," the Alternative Board of North Central New Jersey (TABNJ), Business Owners Symposium Series, 4/07/2017
- "Critical Contracts for Your Organization," ASAH Business Manager Workshop, 12/15/2016

## Practices

- Wealth Preservation
- Corporate
- Data Privacy

## Area of Focus

- Asset Protection
- Charitable Planning

## Deirdre R. Wheatley-Liss Cont.

- Elder Law
- Estate Planning
- Guardianship
- Probate and Trust and Estate Administration
- Trusts and Estates Litigation
- Privately-owned Business Planning
- Corporate Tax

## Prior Relevant Experience

- Business Consultant, Prudential Financial - Estate Planning, Business Planning and Retirement Planning Group

## Media Mentions

- "Progress Over Perfection," *Failed Forward Podcast*, 7/24/2024
- "Transforming Your Practice: The Client-Centric Journey," *Legal Visionaries Podcast*, 11/28/2023
- "Automation and AI Opportunities for Estate Planners," *Legal Visionaries Podcast*, 10/17/2023

## Bar Admissions

- New Jersey, 1997
- New York, 1998

## Education

- *New York University School of Law*  
LL.M. in Taxation, 2000
- *Boston College School of Law*  
J.D., 1995
- *Johns Hopkins University*  
B.A., 1992  
with honors