FOLEY
FOLEY & LARDNER LLP

Brian L. Lucareli

Director of Foley Private Client Services

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Brian L. Lucareli is the Director of Foley Private Client Services and co-chair of the Family Office Group within the firm. In his role, Brian is responsible for the strategic development and deployment of Private Client Services, the firm's multibillion-dollar family office solution providing trust administration and wealth management services to the firm's partner trustees and clients. Brian works closely with our partner trustees and clients, counseling on family office solutions, trust asset allocation strategies, and investment manager/consultant due diligence and selection. Brian also serves as a voting member on the firm's Retirement Plans Committee and is the host of our highly successful Ten-Minute Interview Series, a monthly series of short video recordings on topics of interest to family office executives and prospective family office clients. Prior to joining Foley & Lardner LLP, Brian spent the bulk of his career in the financial services and family office industries, most recently leading the wealth management division for a fifth-generation financial services holding company.

Representative Experience

Brian uses his unique investment knowledge and legal background to counsel partner trustees and clients on the selection and due diligence of investment manager/consultant firms. Most recently, Brian successfully led a formal investment manager/consultant search process for a US$100m family office and a separate US$115m trust relationship. In addition, Brian counsels on the development and implantation of Investment Policy Statements (IPS) within complex client trust relationships.

Awards and Recognition

Brian was recognized earlier in his career as one of the nation's Top Brokerage Program Managers by *Bank Investment Consultant* magazine. Brian has also previously authored numerous articles within the wealth management industry.

Community Involvement

- Member, Board of Directors for a Wyoming Private Trust Company

- Member, Board of Directors of an Ohio Single Family Office
- Member, Investment Sub-Committee, Children’s Hospital Wisconsin & Health System
- Member, Endowment Committee, Boys and Girls Club of Greater Milwaukee
- Member, Investment Committee, Racine Community Foundation
- Board of Directors, Investment Committee, Catholic Community Foundation

Sectors

- Blockchain & Digital Assets
- Family Offices
- Non-Fungible Tokens (NFTs)
- Sports & Entertainment

Practice Areas

- Estate Planning
- Foley Private Client Services
- Fund Formation & Investment Management

Education

- Marquette University Law School (J.D., 1989)
- University of Wisconsin-Madison (B.S., 1986)
    - Economics

Admissions

- Wisconsin
- U.S. District Court for the Eastern District of Wisconsin