

ELIZABETH “LISA” SOLOWAY
INDEPENDENT FIDUCIARY
California Licensed Professional Fiduciary
License No. 180

Elizabeth, known by her nickname “Lisa” is a California Licensed Professional Fiduciary with the State of California Professional Fiduciaries Bureau. Ms. Soloway has been a practicing independent fiduciary since 2005. and is fortunate to be a “go-to” fiduciary in the Bay Area trust and estates community. The Contra Costa court regularly appoints Ms. Soloway to resolve contentious family matters and provide complex trust analyses and accountings.

Lisa attended New York University’s Tisch School of the Arts and the University of California, San Diego where she graduated cum laude and received her B.A. in Theater Arts. While pursuing her interest in theater in Los Angeles, Lisa was the Business Manager of a trend jewelry manufacturer with 2+ million in sales a year and a factory in Mexico. Subsequently she became a consultant for businesses setting up bookkeeping and inventory systems. She earned a certificate in Fiduciary Management of Trusts from California State University, Fullerton and worked in the office of an Independent Fiduciary in Pasadena from 2002 to 2004.

Lisa moved back to the Bay Area at the end of 2004 and joined her father, Leonard Soloway, C.P.A., in his fiduciary practice. In 2008, Leonard and Lisa became partners and formed Soloway Fiduciaries, Inc. Lisa’s creativity and relish for numbers and people are the perfect combination for her work as a fiduciary. She is known for her professionalism, empathy, attention to detail and handling of difficult family matters.

Lisa’s speaking engagements include: “Advanced Investment Concepts for Fiduciaries,” “How Do Annuities and Life Insurance Fit in an Estate,” “30-60-90: Best Practices and Checklists for New Cases,” “Insurance from A to Z,” and “Aging and Technology” for the Professional Fiduciary Association of California; “Protecting our Seniors: The Fiduciary’s Role in Preventing Financial Elder Abuse” and “Married...with children...with Conservator” for Legal Assistance for Seniors Annual Elder Abuse Conferences; and “Demystifying the Trust Protector and Trust Advisory Committee” at the Special Needs Planning Symposium.

Lisa is a California Licensed Professional Fiduciary (license no. 180) with the State of California Professional Fiduciaries Bureau. She is a member of the Professional Fiduciary Association of California, the Past President and current board member of the East Bay Professional Fiduciary Association of California Chapter and Vice-President of the Estate Planning Council of Diablo Valley board. She is board member of Wellspring Educational Services, a non-public school providing education to children with Special Needs and the Regional Center of the East Bay. Nothing makes Lisa happier than a balanced trust accounting, except her daughter.