



## Cassandra L. Manna

**Member**



Cassandra focuses her practice on estate planning and wealth management, and works with family-run business leadership teams to grow and strengthen a company as it prepares to transition from one generation to the next. In addition, Cassandra has extensive experience helping these companies acquire or sell businesses, manage their corporate governance, form and organize an affiliated entity, and negotiate and draft commercial leases.

Cassandra is the Chair of BMD's Empowerment & Opportunity (DE&I) Committee.

### Contact Information

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### Education

**Florida Coastal School of Law**, J.D., magna cum laude

**The Ohio State University**, B.S.B.A.

### Overview

Cassandra works with clients in all matters relating to their estate and wealth planning. She meets with clients on a regular basis to discuss their goals and objectives upon the death or disability of them individually or their spouse. Her clients include individuals, who may be looking to negotiate the terms of a prenuptial agreement, prepare their assets for a smooth transition to a new owner upon their death or disability, or create a foundation legacy after death; couples, who are looking to take care of their young children, make sure their spouse is cared for when they are gone, who want to protect their wealth after death, to protect the interest of grandchildren, to donate to charitable organizations, or to create a foundation in their name; and small to medium-sized businesses, whose leadership wants to protect the voting interests and growth of the company from personal complications, including divorce, death or disability.

Her representative experience includes drafting full estate plans for individuals and couples, such as:

- Wills
- Revocable Trusts
- Irrevocable Trusts
- Legacy Trusts

- Healthcare Powers of Attorney
- Durable General Powers of Attorney
- Living Wills
- Revocation or Termination of Trusts
- Prenuptial Agreements

### ***Corporate Finance Practice***

Cassandra has experience representing clients in both buyer and seller M&A transactions ranging from \$600K to \$10M, middle market commercial lending (both asset-based and property backed deals) including 504 and SBA loans, affordable housing deals with the Ohio Housing Finance Agency, including 4% and 9% low-income housing tax credits (LIHTC), restructuring business entities, corporate governance compliance and updates, and SEC Private Placement Memorandum. She has represented Certified Development Companies (CDCs) to promote economic development in the Cleveland area.

Her experience includes managing an M&A sale or purchase from beginning to end, including drafting and negotiating the following:

- Asset Purchase Agreement
- Real Estate Purchase Agreement
- Management Agreements
- Shareholder Agreements
- Disclosure Schedules
- Bills of Sale
- Promissory Notes
- Assignment and Assumption Agreements
- Subscription Agreements
- Closing Statements
- Corporate Governance Documents (e.g., authorizing resolutions, certificates of knowledge, incumbency certificates, issuance or assignment of units)

### Professional Affiliations

- Ohio State Bar Association
- Florida State Bar Association

### Community & Civic Affiliations

- Estate Planning Council of Cleveland, Member
- Cleveland's Women in Finance (WiF) Networking Group
- St. Vincent Church Foundation, Board Member
- St. Vincent-St. Mary High School Foundation, Board Member
- Honor Flight Cleveland, Guardian
- Cleveland Bocce Club, Director
- Cleveland Metropolitan Bar Association 3Rs Program, Teacher (2016-2019)
- Kids' Book Bank, YP Board Member, Secretary (2018-2022)
  - Diversity, Equality, and Inclusion Committee

### Professional Honors & Awards

- Ohio Super Lawyers "Rising Stars" (2023-2024)
- Best Lawyers: Ones to Watch® in America - Trusts and Estates (2023-2024)

## Presentations

- Panelist for CLE presentation of Medical Marijuana at the AMCNO/CMBA Medical Legal Summit (Fall 2017)
- CLE presenter on Medical Marijuana at the Akron Bar Association's Labor and Employment CLE (October 12, 2017)
- Presenter on Medical Marijuana at the Ohio Clerk of Courts Association Annual Meeting (2017)
- Presenter at the Thomas Jefferson International Newcomers Academy (February 2017)

## Publications

- *Investment Training for the Second and Third Generations*, Crain's Cleveland, January 2021
- *The 3Rs Program: Including Immigrants and Refugees*, CMBA Journal, May 2017
- *Ohio Medical Marijuana Law to Take Effect in September*, Northern Ohio Physician from the Academy of Medicine of Cleveland & Northern Ohio, September/October 2016, Vol. 101, No. 5

## Practice Areas

Business & Corporate Law

Real Estate

Banking & Finance Law

Estate, Tax & Wealth Planning

Contact Cassandra Today!