

# LISA DILLMAN

OWNER & ATTORNEY APPLEGATE & DILLMAN ELDER LAW

Lisa is a practicing attorney, serial entrepreneur and thought leader with more than 25 years of experience advocating for the clients and businesses she serves. It is her mission to make lasting change in the elder law space, bringing a holistic, collaborative approach to how we care for the aging population.



## EXPERIENCE

**Applegate & Dillman Elder Law**  
Owner & Attorney  
August 2019- Present

Owner and Attorney at a female-owned firm of 16 lawyers and staff members with three locations in Central Indiana. The firm offers a variety of services including estate planning, Life Care Planning, Medicaid planning, probate and trust administration, and guardianship services.

**Elderji Consulting**  
Senior Consultant  
August 2017-Present

Founded a boutique consulting firm that engages organizations serving an aging population in order to aggressively grow their businesses in a rapidly-changing market. Responsible for market research, strategic planning and managing two consultants.

**Senior Summit Indy**  
Founder & Speaker  
August 2017- Present

Founder and Host of the annual Senior Summit conference, a platform for collaboration, education and the sharing of resources among top professionals in the longevity market. As the industry grows and evolves exponentially with the aging of the Baby Boomer generation, Indianapolis businesses will be prepared to work together to accommodate any issues that the senior market faces.

**Dillman Law Group**  
Founder & Managing Attorney  
January 2005- August 2019

Founded a senior-centered law firm that focused on all aspects of Elder Law, including long-term care planning, Medicaid planning, Veterans benefits planning, probate administration, probate litigation, guardianships, estate planning and trust administration.

## EDUCATION

1995

Indiana University School of Law  
Doctor of Jurisprudence, May 1995

- Executive Articles Editor Indiana Law Review
- American Jurisprudence Award
- Torts and Secured Transactions Order of the Barristers

1992

University of Illinois  
Bachelor of Arts,  
American Civilization Major, 1992

- Full Athletic Scholarship
- Women's Volleyball Team Big Ten Conference Champion, 1987, 1988, and 1989
- NCAA Final Four Participant, 1987 and 1988

## PUBLICATIONS

- "Don't Go Broke in a Nursing Home, Indiana Edition, June, 2014 (co-authorship).
- Insurance "Bad Faith Setup" Dealing with the Practicalities, Defense Trial Counsel of Indiana, March 2011
- Survey of Recent Developments in Insurance Law, Indiana Law Review

## AWARDS

- 2018 Recognizing Excellence in Elder Law, Lawyers of Distinction
- 2017 Top 10% Elder Law Attorney in the U.S., Lawyers of Distinction
- 2017 10 Best Law Firms in Indiana, American Institute of Family Law Attorneys
- 2016 Client Satisfaction Award, American Institute of Family Law Attorneys
- 2016 10 Best Female Attorneys in Indiana, American Institute of Family Law Attorneys

## COMMUNITY

- Ardathe Burkhart Leadership Series, United Way Central Indiana
- Executive Board, Meals on Wheels Central Indiana
- Vice President of Full Board of Directors, Meals on Wheels Central Indiana
- Chair of Strategic Planning & Development Committee, Meals on Wheels Central Indiana
- Chair of Veterans Benefits Committee of Elder Law Section, Indiana State Bar Association

## SPEAKING

- "Protecting Your Loved Ones and Assets, a Three Part Series," Virtual, March 2020
- "What is Long Term Care Planning?" Storen Financial, Zionsville, Indiana, November 2019
- "Advanced Special Needs Planning" Carmel, IN December 2019
- "Advanced Elder Law," National Business Institute, Indianapolis, Indiana, December 9, 2017.
- "Understanding Baby Boomer Buying Trends," Indianapolis, IN February 2018

# LISA DILLMAN

OWNER & ATTORNEY APPLGATE & DILLMAN ELDER LAW

Lisa is a practicing attorney, serial entrepreneur and thought leader with more than 25 years of experience advocating for the clients and businesses she serves. It is her mission to make lasting change in the elder law space, bringing a holistic, collaborative approach to how we care for the aging population.

## EXPERIENCE

LEWIS WAGNER, LLP

Of Counsel

March 1999-Present

Complex litigation and appellate practice including professional malpractice, insurance bad faith, insurance coverage, insurance defense, creditors' rights, premises liability, employment, products liability, environmental, domestic relations and general commercial litigation. Counsel small business clients, regarding commercial collections, regulatory compliance, human resources, and family estate planning and wealth management.

Chancellor Gerald Bepko

Research Assistant

January 1995 - August 1995

Conducted research on the history of Article 2 of the Uniform Commercial Code, Prepared Chancellor Bepko for monthly meetings of the Permanent Editorial Board of the UCC. Corresponded with corporations concerned with the proposed revisions to Article 2. Drafted Article 2 revisions.

Faegre Baker Daniels

Associate Attorney August 2017-  
February 1995- February 1999

Litigated cases involving employment issues, products liability, insurance defense and coverage (including domestic and international coverage arbitrations), ERISA, RICO and general commercial litigation under Articles 2, 3, 4 and 9 of the Uniform Commercial Code in state and federal courts. Represented and advise secured and unsecured creditors, debtors, and Trustees in bankruptcy matters including negotiating and effectuating sales of assets, initiating litigation to recover estate assets, analyzing claims and proposing plan of confirmation.

Ice Miller

Summer Associate

May 1994 - August 1994

Performed legal research and prepared legal memoranda, briefs, motions, and other documents in the areas of Real Estate, Environmental, Health, Labor, Litigation, Products Liability, and Tax.

## AFFILIATIONS

- National Academy of Elder Lawyers
- ElderCounsel, LLC
- Indiana State Bar Association
- Indianapolis Bar Association

## ADMISSIONS

- State of Indiana, 1995
- U.S. District Courts, 1995
- Southern District Court of Indiana, 1995
- Northern District Court of Indiana, 2001
- Seventh Circuit Court of Appeals, 2016
- U.S. Court of Appeals for Veterans Claims, 2017

## PUBLISHED DECISIONS

- Nunally v. Morris, Slip Copy (U.S. District Court, S.D. Ind 2020)
- Roseferin Investments, LLC v. Morris, Slip Copy (U.S. District Court, S.D. Ind 2020)
- Markel Insurance Company v. United Emergency Medical Services, LLC, Not Reported in Fed. Rptr. (U.S. Ct. App. Seventh Circuit 2019)
- Hamilton v. Steak 'n Shake Operations Inc., 92 N.E.3d 1166 (Ind. Ct. App. 2018)
- Certa v. Steak 'n Shake Operations Inc., 102 N.E.3d 336 (Ind. Ct. App. 2018)
- Hamdan v. Indiana University Health North Hospital, Inc., 880 F.3d 416 (U.S. Ct. App, Seventh Circuit 2018)
- Hawver v. MetLife Insurance Company USA, Not Reported in Fed. Supp. (U.S. District Ct. S.D. Ind. 2016)
- In re Visitation of K.M., 42 N.E.3d 572 (Ind. Ct. App. 2015)
- Hamdan v. Indiana University Health North Hosp., Inc., Not Reported in F. Supp.3d (U.S. District Ct. S.D. Ind. 2015)
- Sroufe v. Zurich American Insurance Company, Not Reported in Fed. Supp. (U.S. District Ct. N.D. Ind. 2014)
- Adamson v. Adamson, 13 N.E.3d 550 (Ind. Ct. App. 2014)
- Meizelis v. Durbin, 974 N.E.2d 511 (Ind. Ct. App. 2012)
- S.C. v. Review Bd. of the Ind. Dep't of Workforce Dev., 2012 Ind. App. Unpub. LEXIS 795 (Ind. Ct. App. 2012)
- Krik v. BP America, Inc., Not Reported in F.Supp.2d (U.S. District Ct., E.D. PA 2012)
- Meizelis v. Durbin, 974 N.E.2d 511 (Ind. Ct. App. 2012)
- Clarian Health Partners v. Wagler, 925 N.E.2d 388 (Ind. Ct. App. 2010)
- Neighborhood Housing Services of America, Inc. v. Turner-Ridley, 742 F.Supp.2d 964 (U.S. District Ct. N.D. Ind. 2010)
- Neighborhood Housing Services of America, Inc. v. Rainbow Community Organization, Inc., Not Reported in F.Supp.2d (U.S. District Ct. N.D. Ind. 2009)
- Kho v. Pennington, 875 N.E.2d 208 (Ind. S.C. 2007)
- Kho v. Pennington, 846 N.E.2d 1036 (Ind. Ct. App. 2006)
- Inlow v. Henderson, Daily, Withrow & DeVoe, 787 N.E.2d 385 (Ind. Ct. App. 2003)
- Allied Signal, Inc. v. Herring, 785 N.E.2d 1090 (Ind. 2003)
- Richter v. Asbestos Insulating & Roofing, 790 N.E.2d 1000 (Ind. Ct. App. 2003)
- Harris v. A.C. & S., Inc., 785 N.E.2d 1087 (Ind. 2003)
- Harris v. A.C. & S., Inc., 766 N.E.2d 383 (Ind. Ct. App. 2002) Camplin v. AC and S, Inc., 768 N.E.2d 428 (Ind. 2002) Martin v. AC&S, Inc., 768 N.E.2d 426 (Ind. 2002)
- Black v. ACandS, Inc., 752 N.E.2d 148 (Ind. Ct. App. 2001)
- Poirier v. A.P. Green Servs., 754 N.E.2d 1007 (Ind. Ct. App. 2001) Allied Signal, Inc. v. Herring, 757 N.E.2d 1030 (Ind. Ct. App. 2001) Osterman v. Baber, 714 N.E.2d 735 (Ind. Ct. App. 1999)
- Hawkeye Nat'l Life Ins. Co. v. AVIS Indus. Corp., 122 F.3d 490 (8th Cir. 1997)
- Bollenbacher v. Helena Chemical Co., 934 F.Supp. 1015 (U.S. District Court, N.D. Ind. 1996)