Shutts

TRUSTS AND ESTATES

Our Trust and Estates attorneys focus on helping clients transfer property efficiently to their beneficiaries and help lower estate, gift, generation-skipping and income taxes and build close relationships over many years with our clients and their families.

Our attorneys are Florida Bar Board Certified in Wills, Trusts, and Estates, hold Masters of Laws in taxation or are former certified public accountants. Many have also authored numerous books, articles, and chapters, and taught or lectured on estate planning and estate and trust administration topics.

Experience

Members of our team provide legal services to both individual and corporate personal representatives, trustees, and beneficiaries on federal and state tax issues, including representation before taxing authorities, as well as matters considered by the probate court. We also assist trustees and beneficiaries with trust modifications, reformations, and trust conversions as well as with accountings and other obligations arising from the trust or estate. Further, we establish both voluntary and involuntary guardianships for incapacitated persons.

When disputes cannot be resolved amicably, we also assist personal representatives, trustees and beneficiaries in appropriate litigation. We have handled will and trust contests and claims of beneficiaries and have defended trustees from actions brought by beneficiaries.

Our attorneys tailor estate plans for individuals by considering sophisticated and straightforward estate planning devices. These include wills, revocable and irrevocable trusts, life insurance trusts, §2503(c) trusts for minors, credit shelter trusts, gifts, qualified terminable interest (QTIP)/marital trusts, charitable remainder trusts, charitable lead trusts, qualified personal residence trusts, grantor retained annuity trusts, and qualified domestic trusts, estate freezes, and prenuptial agreements.

We also handle a significant amount of international estate planning. Our attorneys represent many clients in South America, the Caribbean and Europe on pre-immigration planning and estate planning.

Our Commitment

We help our clients to do what's best for themselves, their families, and their intended beneficiaries. We take pride in helping our clients discuss the issues that people often avoid discussing, and we do it compassionately and candidly.

For more information, please see our Private Client Services Practice Group.

Professionals

Charla M. Burchett

Sunny Dingman

Sarah J. Harnden

Shelly Wald Harris

Linda Jorge Carbone

Peter A. Lagonowicz

Patrick J. Lannon

Jordan G. Lee

Francis E. Rodriguez

JoAnne "Joleen" K. Searles

Ricardo J. Souto

Veronica Vilarchao

Related Practices

Private Client Services