JORDAN G. LEE

PARTNER

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Jordan G. Lee is a partner in the Tampa office of Shutts & Bowen LLP, where he is Chair of the Private Client Services Practice Group.

Jordan is Florida Bar Board Certified in Wills, Trusts and Estates. He concentrates his practice in the areas of complex estate planning, estate and trust administration, federal income, estate, gift, and generation-skipping transfer taxation, private foundations and other tax-exempt organizations, pre-marital and post-marital agreements, and business succession planning. In addition, Jordan frequently assists clients with estate and trust litigation, corporate, partnership, and real estate matters.

Jordan has experience with revocable and irrevocable trusts, homestead issues, probate, family limited partnerships and limited liability companies, life insurance trusts and life insurance planning, grantor retained annuity trusts, qualified personal residence trusts, sales to grantor trusts, multi-generation dynasty trusts, trusts for minors, preparation of federal estate, gift, and fiduciary income tax returns (Forms 706, 709, and 1041), IRS audits of federal estate and gift tax returns, qualified and non-qualified retirement plans, shareholder and buy-sell agreements, fiduciary duties, and post mortem estate planning.

Practice Areas

Private Client Services

Corporate

Trusts and Estates

Accolades

- *Florida Trend*, Florida Legal Elite, 2019

- Florida Bar Board Certified in Wills, Trusts and Estates
- *Florida Super Lawyer*, Estate & Probate, 2021, 2022, 2023, 2024
- *Florida Super Lawyers*, Rising Star, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018
- *Best Lawyers in America®*
  - Closely Held Companies and Family Business Law, 2023, 2024, 2025
  - Trusts and Estates, 2019 - 2025
  - Litigation - Trusts and Estates, 2021-2025
  - Tax Law, 2022, 2023, 2024, 2025

Education

- University of Florida College of Law, LL.M. in Taxation, 2005
- University of Florida College of Law, J.D., *magna cum laude*, 2004
- University of Florida College of Business Administration, B.S., Computer Information Sciences, with honors, 2001

Bar Admissions

Florida

Court Admissions

- All Florida State Courts
- United States Tax Court

Professional and Civic

- The Florida Bar
  - Tax Section
  - Real Property, Probate and Trust Section
- American Bar Association
  - Tax Section
  - Real Property, Probate and Trust Section
- Tampa Bay Estate Planning Council
- Founding member and volunteer, Hillsborough County Bar Association's Wills for Heroes pro bono project

- Co-Chair, Real Property, Probate, and Trust Law Section, Hillsborough County Bar Association, 2010-2011

Presentations

- Presenter, "Ancillary Administration and Tax Issues in Florida," Real Property Probate and Trust Law Section meeting, September 2015
- Speaker, "Fiduciary Income Tax Planning in Difficult Economic Times," Ave Maria School of Law Estate Planning Conference, Naples, Florida, 2014
- Presenter, "Ancillary Administration and Tax Issues in Florida," Clearwater Bar Association, Real Property, Probate & Trust Law Section meeting, October 2014
- Presenter, “2011 Ullman Year in Review: Estate Planning Update,” Florida Bar Tax Section Annual Meeting, Amelia Island, Florida, 2011
- Presenter, "Wills and Estate Planning: Preserving Your Legacy," Hillsborough Community College All College Day, Tampa, Florida, 2010
- Presenter, "2010 Ullman Year in Review: Corporate Tax Update," Florida Bar Tax Section Annual Meeting, Amelia Island, Florida, 2010
- Presenter, "Estate Tax Carryover Basis in 2010: Rules and Reporting Requirements," Matthews Benefit Group's 8th Annual Tax and Business Update, Tampa, Florida, 2010
- Presenter, "Estate Tax Repeal: Immediate Planning Opportunities and Impact on Existing Plans," Hillsborough County Bar Association Tax Section Meeting, Tampa, Florida, 2010
- Presenter, "The New IRS Form 990," CPE Extravaganza, Clearwater, Florida, 2008
- Presenter, "The Effect of Post-Death Events on Valuation of Estate Tax Deductions: New Proposed Regulations under Section 2053," CPE Extravaganza, Clearwater, Florida, 2007
- Presenter, "Deducting Investment Advisor Fees on Fiduciary Income Tax Returns: Section 67(e) and the *Rudkin* Case," CPE Extravaganza, Clearwater, Florida 2007
- Presenter, "Basic Estate Planning," Hillsborough Community College All College Day, Tampa, Florida, 2007.
- Presenter, "Revocable Living Trusts and other Basic Estate Planning Tools," Hillsborough County Sheriff's Office Alumni Association, Tampa, Florida, 2006

Publications

- "Section 12 of the Clayton Act: When Can Worldwide Service of Process Allow Suit in any District?" Author, 56 *Florida Law Review* 673, 2004