



## SHELLY WALD HARRIS

### PARTNER

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Shelly Wald Harris is a partner in the West Palm Beach office of Shutts & Bowen LLP, where she is a member of the Private Client Services Practice Group. Shelly is Board Certified in Wills, Trusts and Estates by the Florida Bar.

Shelly counsels clients on their future goals and helps them navigate the estate planning process. She works with individuals and families of moderate to high net worth in their estate, trust, charitable, and domicile planning. She is experienced in building custom plans that make the best use of revocable, irrevocable, charitable, insurance, and dynasty (generation skipping) trusts to optimize her clients' personal and tax goals while protecting their assets. She is also experienced with numerous tools, such as Irrevocable Life Insurance Trusts (ILITs), Family Limited Partnerships (FLPs), Qualified Personal Residence Trusts (QPRTs), Grantor Retained Annuity Trusts (GRATs), and Spousal Lifetime Access Trusts (SLATs).

In addition, Shelly represents corporate and individual fiduciaries with respect to trust and estate administration. She administers estates and represents trustees, personal representatives, and other fiduciaries as well as beneficiaries and creditors of estates in transactional and litigation matters. She prepares estate tax returns, gift tax returns, and accountings. She helps couples with residences and premarital agreements, and families with passing down family businesses, obtaining private letter rulings from the IRS, advance directives (such as health care surrogates and living wills) and various elder law issues.

Shelly is the co-author of *Florida Estate Planning*, part of West's Florida Practice Series published by Thomson Reuters, which she updates annually, and the author of chapters in various continuing legal education books for attorneys. She has given lectures to other attorneys, accountants, financial planners and paralegals on various estate planning and estate administration issues.

### Practice Areas

Private Client Services

## Shelly Wald Harris

Trusts and Estates

### Accolades

- Florida Bar Board Certified in Wills, Trusts & Estates
- "Top Lawyer," *Palm Beach Illustrated*, 2018, 2022

### Education

- University of Miami, J.D., *cum laude*, 1998
- Vanderbilt University, B.A., 1995

### Bar Admissions

Florida

### Professional and Civic

- Graduate of Class II, [Florida Fellows Institute](#), American College of Trust and Estate Counsel (ACTEC)
- Trust Law Committee, Real Property, Probate, & Trust Law Section, The Florida Bar
- Probate Law & Procedure Committee, Real Property, Probate, & Trust Law Section, The Florida Bar

### Presentations

- "Key issues under the Florida Trust Code," Florida Institute of Certified Public Accountants seminar (June 2011, December 2008).
- "The Probate Process: a Spouse's Right to the Elective Share," National Business Institute Training Seminar (December 2010).
- "What is Congress Doing Now? A brief estate planning update," American Lung Association luncheon (April 2010).
- "Spousal Rights in Florida," Institute for Paralegal Education webinar (July 2009).
- "Estate planning in the current economic climate," American Lung Association luncheon (April 2009).
- "The Probate Process From Start To Finish," National Business Institute Seminar (January 2009, January 2008).
- "Estate Administration Process for Spouses," McQuillan Education Estate Planning & Probate Training Seminar (April 2008).

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- "Drafting Effective Wills and Trusts," National Business Institute Seminar (May 2007).

### Publications

- Co-author, *Florida Estate Planning*, 2023-2024 ed., West's Florida Practice Series
- Author, "Practices for Avoiding Probate and Trust Disputes," *Managing Disputes over Wills And Inheritance*