

Shutts & Bowen Attorneys Attend the 13th Annual STEP Miami Summit

11.4.24

On October 25, Shutts & Bowen Miami Tax partners [Ricardo Souto](#), [Francis "Frank" Rodriguez](#) and Peter Lagonowicz attended the 13th Annual STEP Summit at The Ritz-Carlton, Key Biscayne.

The event brought together industry pioneers and thoughtful leaders for impactful sessions, from compliance challenges in an age of AI to offshore structure strategies, LATAM tax updates, and a keynote by Michael Reid, Former Bello columnist and Senior Editor for Latin America at The Economist.

STEP Miami is a non-profit global profession association for practitioners who specialize in family inheritance and succession planning. Members work to improve public understanding of the issue's families face in this area and promote education and high professional standards among our members.

Rick Souto currently serves on the Board of Directors.

To learn more about the organization, please click [here](#).

About Ricardo J. Souto

[Ricardo J. Souto](#) is a partner in the Miami office of Shutts & Bowen LLP, where he practices taxation, estate planning and corporate planning and is Co-Chair of the Tax & International Law Practice Group. Ricardo regularly represents and advises foreign clients on their investments in the United States and related U.S. income tax and estate planning matters. He represents numerous domestic clients in matters involving corporate mergers and acquisitions, income tax planning, and corporate structuring. He also advises clients on federal tax planning as well as state and local tax issues.

About Francis E. "Frank" Rodriguez

[Francis E. "Frank" Rodriguez](#) is Chair of the firm's Executive Committee and a member of the Tax and International Law Practice Group. A Martindale-Hubbell AV® rated attorney, Frank focuses his practice on general business transactions, with an emphasis on federal and Florida tax issues. Frank frequently advises lenders and borrowers engaging in commercial financing transactions. With respect to Florida matters, Frank coordinates voluntary self-disclosures with the Florida Department of Revenue. Frank represents non-resident individuals and foreign corporations with inbound tax planning, and U.S. individuals and domestic corporations with outbound tax planning. He counsels international families in succession planning, estate planning, trust issues, probate administration



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and litigation matters, and federal tax reporting, including voluntary self-disclosures. In connection with his international practice, Frank represents acquirers and sellers of multi-national businesses.

About Peter A. Lagonowicz

Peter A. Lagonowicz is a partner in the Miami office of Shutts & Bowen LLP, where he is Co-Chair of the Tax & International Law Practice Group. He is also Chair of the firm's Latin America Practice Group. Peter regularly represents high net worth private clients, family offices, funds and other business entities with assets and investments in and outside the United States. He has advised both U.S. and international clients on a wide variety of domestic and cross-border commercial transactions.

Professionals

Francis E. Rodriguez

Ricardo J. Souto

Practice Areas

Taxation

Offices

Miami