

Shelly Wald Speaks at FICPA Seminar

6.21.11

Shelly Wald, a trust & estate attorney based in Shutts & Bowen's West Palm Beach office, discussed key issues under the Florida Trust Code at a recent West Palm Beach Chapter of the Florida Institute of Certified Public Accountants seminar. Held at the Bear Lakes Country Club, nearly 40 local CPAs attended to learn how to prepare an accounting under the Florida Trust Code. Ms. Wald also spoke about Florida's Principal and Income Act, including discussions on the trustee's power to adjust, converting income trusts to unitrusts, and allocating income and principal on accountings. Ms. Wald also informed the group about a trustee's ability to reform a trust to achieve the tax goals of the settlor.

Ms. Wald works with individuals and families of high net worth, focusing exclusively on estate planning and trust and estate administration. She is one of a limited number of Florida attorneys Board Certified in Wills, Trusts and Estates by the Florida Bar.

Professionals

Shelly Wald Harris

Practice Areas

Private Client Services

Trusts and Estates