

Shelly Wald Speaks to Florida Association of CPAs

12.5.08

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 President's Country Club, over 40 local CPAs attended to learn how to prepare an accounting under the Florida Trust Code, as well as how it can be used to protect clients from liability. Additional topics included who must be served with accountings, and how to deal with minor, incapacitated, unascertainable and missing beneficiaries. Ms. Wald also provided guidance for accountants serving as trustee of trusts and outlined the benefits of trust reformation.

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