LEE-FORD TRITT

Professor of Law **tritt@law.ufl.edu**
University of Florida College of Law **352.273.0952**

ACADEMIC POSITIONS:

University of Florida College of Law – Gainesville, Florida
The David H. Levin Chair of Law – June 2022 to present
Director of the Graduate Tax Programs – June 2023 to present
University Term Professor – August 2019 to present
Professor of Law and Member of the Graduate Tax Faculty – August 2011 to present
Director, The Center for Estate Planning – May 2005 to present
Director, Estate Planning Practice Certificate Program – May 2005 to present
Associate Director, The Center on Children and Families – August 2005 to present
Associate Professor of Law – August 2008 to August 2011
Assistant Professor of Law – May 2005 to August 2008

- J.D. and LL.M. course offerings include: Trusts & Estates, Federal Income Taxation; Fiduciary Administration, Federal Estate & Gift Taxation; Estate Planning; Advanced Topics in Estate Planning; Graduate Tax Research Seminar; Taxation of Property Transactions, Introduction to U.S. Tax Law, and Organizational Theory and the Law.
- University of Florida's Presidential Award for Excellence in Education: 2010.
- College of Law Professor of the Year: 2008-2009; 2009-2010; 2010-2011; 2011-2012; 2012-2013; 2013-2014, 2014-2015. (The College of Law has not awarded this honor since 2015.)
- John Marshall Bar Association College of Law Lifetime Achievement Award for Teaching: 2015.
- University of Florida's Impact Award: 2012.
- BALSA Outstanding Mentor: 2008; 2011; and 2015.
- College of Law service includes acting as the Director of the Center for Estate Planning, Director for the Estate Planning Practice Certificate Program, Supervisor of Probate Externships, and Faculty Advisor to the Tax Moot Court, and Faculty Advisor to The Estates and Trusts Law Society and Caribbean Law Society.
- College of Law service also includes serving on, or previously served on, the following committees: Curriculum, Student Admissions, Academic Standards, Adjunct Teaching, Student Life, Diversity & Community Relations, and Florida Bar CLE.
- University service includes serving on the Concerns Committee; speaking and advising the Institute on Aging at the University of Florida Health Science Center; speaking and advising for the University of Florida Foundation, and speaking at Florida Grand Guard events.
- Honorary member of Florida Blue Key.

Boston University School of Law – Boston, Massachusetts
Visiting Professor of Law – Fall 2015

- Course offerings include Trusts, Wills & Estates; and Estate Planning.

PROFESSIONAL APPOINTMENTS:

American College of Trust and Estate Counsel ("ACTEC") – 2013 to present.

Leadership positions to various groups and standing committees of the Real Property, Trusts and Estates Law Section of the American Bar Association, including the Leadership and Mentoring Group, Non-Tax Estate Planning Considerations Group, Legal Education and Uniform Laws Group, Diversity and Inclusion Committee, and Community Outreach Committee.

Contributing Editor, Trusts & Estates Section of the Jotwell Law Literature Review – 2009 to present.

President, The Association of American Law Schools Section on Trusts & Estates – 2016 to 2017.

Co-Chair, Settlor Over Beneficiary Ad Hoc Committee, Florida Bar Association: Section on Real Property, Probate and Trust. Law – 2015 to 2017.

Advisor, Committee on an Act on the Recovery of Stolen Cultural and Artistic Property, The National Conference of Commissioners on Uniform State Laws – 2009 to 2012.

EDUCATION:

New York University School of Law – New York, New York
LL.M., Taxation, December 2002
J.D., June 1997

The University of the South – Sewanee, Tennessee
B.A., May 1989, in History and Political Science

LEGAL EMPLOYMENT:

Davis Polk & Wardwell – New York, New York
Trusts, Estates and Exempt Organizations Associate – July 2000 to July 2004

- Drafted Wills, Revocable Trust Agreements, Charitable Split Interest Trusts, Qualified Personal Residence Trusts, Irrevocable Life Insurance Trusts, Rolling G.R.A.T.s, Split Dollar Agreements, Transmutation Agreements, and other sophisticated estate planning instruments for individual, high-net worth clients. Drafted documentation relating to installment sales to Defective Grantor Trusts.

- Structured and represented private foundations and public charities. Drafted incorporation documents, pledge agreements, grant making guidelines, I.R.S. Forms, and related instruments and forms. Advised individual clients regarding the use of private and public charitable entities to implement tax strategies, and estate planning goals. Advised non-profit entities on structure, governance, and operations, including tax regulations, investment issues, and other matters related to endowments, grants, and solicitations.

- Formed corporations, limited liability companies, limited liability partnerships, and family partnerships. Negotiated and drafted buy-sell agreements, stock purchase agreements, assignments, promissory notes, separate property agreements, and various instruments of transfer.

- Counseled high-net worth individuals and directors of client organizations regarding innovative tax and estate planning strategies for structuring personal holdings.

Milbank, Tweed, Hadley & McCloy LLP – New York, New York
Trusts, Estates and Exempt Organizations Associate – September 1997 to July 2000

- Engaged in all aspects of trusts and estates practice, including the drafting of complex trusts and estates and transfer tax related documents.

- Designed and conducted major presentations to client organizations, including the Board of Directors of the New York Stock Exchange and executives of The Chase Manhattan Private Bank regarding innovative tax and estate planning products.

- One of three associates in the 400 lawyer Firm selected to sit on the Recruiting and Hiring Committee.

SELECTED PUBLICATIONS:

Law Review Articles:

An Organizational Theory of Business Trusts (*forthcoming* 2025).

The Decline of Trust Exceptionalism (*forthcoming* 2025).

In the Interest of Justice: Judicial Overreach in Trust Construction (forthcoming 2025).

*Data Trusts: Use and Limitations (f*orthcoming *2024).*

The Curious Case of the James Brown Estate, 92 GEO. WASH L. REV. [ ] (2024).

The Use of AI-Based Technologies in Arbitrating Trust Disputes, 58 WAKE FOREST L. REV. 1203 (2023).

Litigation Blues for Red-State Trusts : *Judicial Construction Issues for Wills and Trusts*, 72 U. FLA. L. REV. 841 (2020).

Reimagining the Business Trust as a Sustainable Business Form, 97 WASH. U. L. REV. 1 (2019)(with Ryan Scott Teschner).

- Featured in The Columbia Law School's Blue Sky Blog, February 28, 2020.
- Highlighted in Bloomberg's Opinion Column, Money Stuff, "*Robinhood Picked a Bad Day to Break, Waymo financing, stakeholderism, trusts and Great Neck*," March 3, 2020.

The Stranger-to-the Marriage Doctrine, 2019 WIS. L. REV. 373 (2019).

The Rise of Business Trusts in Sustainable Neo-Innovative Economies, 88 U. CIN. L. REV. 735 (2019))(Symposium)(with Ryan Scott Teschner).

Amazon Delivers Diversity: Geographical and Social Influences on Corporate Embeddedness, 16 BERKELEY BUS. L.J. 1 (2019)(with Ryan Scott Teschner).

United States v. Windsor: The Marital Deduction that Changed the Marriage, 42 ACTEC LAW J 2001 (2017).

Moving Forward by Looking Back: The Retroactive Application of Obergefell, 2016 WIS. L. REV. 874 (2017).

The History, Impact, and Future of the Benefit-of-the-Beneficiary Rule, Parts I & II, Koren Est. Tax & Pers. Fin. Plan Update (2015).

Dispatches from the Trenches of America's Great Gun Trust Wars, 108 NW. U. L. REV. 743 (2014).

Windsor's Wake: Non-Traditional Estate Planning Issues for Non-Traditional Families, 48 U. MIAMI HECKERLING INSTITUTE ON ESTATE PLANNING ¶ 11 (2014 University of Miami).

Promoting Trust in Trusts & Estates, 5 INTERNATIONAL JOURNAL OF ARTS & SCIENCES 751 (2012)(with Michael R. Siebecker).

The Limitations of An Economic Agency Cost Theory of Trust Law, 32 CARDOZO L. REV. 2579 (2011).

- Named one of the top ten Estate & Gift Tax Articles of 2011, 134 Tax Notes 1453 (Mar. 2012).

Technical Correction or Tectonic Shift: Competing Default Rule Theories Under the New Uniform Probate Code, 61 ALA. L. REV. 273 (2010).

Sperms and Estates: An Unadulterated Functionally Based Approach to Parent-Child Property Succession, 62 SMU L. REV. 367 (2009).

Liberating Estates Law from the Constraints of Copyright, 38 RUTGERS L.J. 109 (2006).

Other Articles:

Estate Planning Construction Issues Post-Obergefell, TRUSTS & ESTATES MAGAZINE, November 2020, at 18.

Benefit-of-the-Beneficiary Rule, 34 PROBATE & PROPERTY *2 (March/April 2020)(with Mary O'Reilly).*

Statutory Copyright Terminations and Artist-Endowed Foundations, NATIONAL STUDY OF ARTIST-ENDOWED FOUNDATIONS (Aspen Institute 2013).

A Question of Value, The Evolution of Formula Clauses Through the Decades, 47 REAL PROP. TRUST & ESTATE L.J. 467 (June 2013)(with Patrick J. Duffy).

What Do Trustees Owe the Remainder Beneficiaries of Revocable Trusts, REAL PROP. TRUST & ESTATE LAW EREPORT (June 2013).

Six Important Cases of the Past Year, REAL PROP. TRUST & ESTATE LAW EREPORT (June 2012).

Parent-Child Property Succession, TRUSTS & ESTATES MAGAZINE, Aug. 2009, at 18.

Books and Book Chapters:

Fiduciary Law, OXFORD HANDBOOK OF COMPARATIVE TRUST LAW (Oxford University Press) (*forthcoming 2024*).

TRITT, BLOOM AND JOYCE, FEDERAL TAXATION OF ESTATES, TRUSTS, AND GIFTS (LEXIS NEXIS, 2024)

Legislative Approaches to Trust Arbitration in the United States, in ARBITRATION OF INTERNAL TRUST DISPUTES: ISSUES IN NATIONAL AND INTERNATIONAL LAW (S.I. Strong ed.) (Oxford University Press, 2016).

HEALY, GASSMAN, BLATTMACHR, TRITT, CROTTY, ARANGO AND BROWN, THE LEGAL GUIDE TO NFA FIREARMS AND GUN TRUSTS, (Haddon Hall Publishing, 2016).

THE LAW OF SUCCESSION: WILLS, TRUSTS, AND ESTATES, contributing chapter author on transfer taxes (Foundation Press, 2013).

TRITT, WRIGHT AND WEISBERG, FLORIDA PROBATE CODE AND RELATED PROVISIONS WITH COMMENTARY (Aspen Publishers, 2010).

SELECTED PRESENTATIONS:

"Hot Topics and Trends," ABA Section of Real Property, Trust and Estate Law's 36th Annual National CLE Conference, Washington, D.C., May 2024.

"*Estate Planning with Intellectual Property*," American College of Trust and Estate Counsel (ACTEC), Phoenix, AZ, March 2024.

"Hot Topics and Trends," ABA Section of Real Property, Trust and Estate Law's 35th Annual National CLE Conference, Washington D.C., May 2023.

"*Poverty Tax*," Critical Legal Conference, Tromso, Norway, August, 2022.

"*Appalachian Tax*," Global Meeting on Law & Society, Lisbon, Portugal, July 2022.

"*LGBTQ+ Wealth Management for Today's Modern Families*," BNY Mellon Podcast's Your Active Wealth, Episode 10, June 2022.

"*Pedagogy in Trusts and Estates*," ACTEC, Banff, Canada, June 2022.

"*Family Office Trends: The New Vocabulary of the Next Generation and Your Annual Non-Tax Hot Topics,"* ABA Section of Real Property, Trust and Estate Law's 34th Annual National CLE Conference, Dallas, Texas, May 2022.

"*Appalachian Tax*," with Prof. Bridget Crawford, Critical Trusts & Estates Conference, Oklahoma City, Oklahoma, April 2022.

"Hillbilly Tax," with Prof. Bridget Crawford, Critical Tax Conference, Villanova Graduate Tax Program, Villanova, Pennsylvania, April 2022.

"*Heirs Property and Land Fractionation*," with Prof. Danaya Wright, Critical Trusts & Estates Conference, Oklahoma City, Oklahoma, April 2022.

"*Estate Planning with Intellectual and Digital Property*," The 2022 Annual South Carolina Bar Convention, Greenville, South Carolina, January, 2022.

'The Curious Case of the Estate of James Brown," The Distinguished Speaker Series, The Community Foundation of Sarasota County, September 14, 2021.

"*Advancing Business Trusts as on Organizational Form for Estate Planning Purposes*," Southwest Florida Estate Planning Council Meeting, September 2021.

"The Reemergence of Business Trusts," East Coast Estate Planning Council Virtual Meeting, April 28, 2021.

"Hot Topics and Trends," ABA Section of Real Property, Trust and Estate Law's 31st Annual National CLE Conference, a Virtual Experience, April 21, 2021.

"Business Trusts," The Florida Tax Institute Virtual Conference, March 10, 2021.

"Taxes and Wealth,: Two Centuries of the Equal Rights Amendment Conference, University of Florida College of Law, September 25, 2020.

"Tax Issues in The Uniform Trust Code," ABA Section of Taxation Virtual 2020 Fall Tax Meeting, September 29, 2020.

"Abandoned Property: Addressing the Real Estate and Probate Issues—Part II," ABA Section of Real Property, Trust and Estate Law's Community Outreach Project, a Virtual Experience, June 23, 2020.

"Abandoned Property: Addressing the Real Estate and Probate Issues—Part I," ABA Section of Real Property, Trust and Estate Law's Community Outreach Project, a Virtual Experience, June 16, 2020.

"Not Mine, Not Yours: Exploring the Movement to Transform Heirs' Property Laws," ABA Section of Real Property, Trust and Estate Law's 32nd Annual National CLE Conference, a Virtual Experience, May 2020.

"Estate Planning for Millennials, Gen X'ers, and Boomers: A View From the Neural Ground," ABA Section of Real Property, Trust and Estate Law's 32nd Annual National CLE Conference, a Virtual Experience, May 2020.

"Ten Things I Hate about U…TC," ABA Section of Real Property, Trust and Estate Law's 32nd Annual National CLE Conference, a Virtual Experience, May 2020.

"Re-Imagining the Business Trust as a Sustainable Business Forum," The 2019 LLC Institute, Tampa, FL, November, 2019.

"Duties and Powers of Trustee," "Trust Compliance Topics," and "Acceptance and Termination of Administration Issues," American Bankers Association Trust Fundamentals School, St. Louis, Missouri, October, 2019.

"Comparative and International Business Trust Law," CUFE Law School, Beijing, China, July 2019.

"Business Trusts," Singapore Management University School of Law, Singapore, July 2019.

"Luminaries Panel: Thoughts on the State of Practice," ABA Section of Real Property, Trust and Estate Law's 31st Annual National CLE Conference, Boston, Massachusetts, May 2019.

"Secrecy, Security and Hot Topics," ABA Section of Real Property, Trust and Estate Law's 31st Annual National CLE Conference, Boston, Massachusetts, May 2019.

"Sustainable Business Trusts," University of Cincinnati College of Law's Annual Corporate Law Symposium, Cincinnati, Ohio, March 2019.

"Drafting for the Twenty-First Century Family," ABA Section of Real Property, Trust & Estate Law CLE, February 2019.

"Estate Planning Meets Family Law: How to Navigate the Inevitable Collision," University of Florida College of Law, Gainesville, Florida, February 2019.

"Tax Advice in the Age of the 24-Hour News Cycle," ABA Tax Section's Midyear CLE Meeting, New Orleans, Louisiana, January 2019.

"The Rise of Business Trusts in Sustainable New-Innovative Economies," Trusts & Estates Section of The Association of American Law School's Annual Meeting, New Orleans, Louisiana, January 2019.

"Construction Issues in a Post-Obergefell World," Wills, Trusts & Estates Meets Gender, Race & Class, University of Wisconsin Law School, Madison, Wisconsin, October 2018.

"Estate Planning Issues Concerning the Twenty-first Century Family," ABA Tax Section Fall CLE Meeting, Atlanta, Georgia, October 2018.

"Protecting Settlor Intent," New Hampshire Trust Conference, New Castle, New Hampshire, October, 2018.

"Ethical Considerations in Advising Clients on Trust and Wealth Strategies," New Hampshire Trust Conference, New Castle, New Hampshire, October, 2018.

"Duties and Powers of Trustee," American Bankers Association Trust Fundamentals School, Pittsburgh, Pennsylvania, August, 2018.

"Trust Compliance Topics," American Bankers Association Trust Fundamentals School, Pittsburgh, Pennsylvania, August, 2018.

"Acceptance and Termination of Administration Issues," American Bankers Association Trust Fundamentals School, Pittsburgh, Pennsylvania, August, 2018.

"The Twenty-first Century Family: Drafting Wills and Trusts in a Time of Changing Concepts of Family, Gender, and Race," ABA Section of Real Property, Trust & Estate Law Spring 2018 Symposia, Orlando, Florida, May 2018.

"*Hot Topics, Current Trends, and a Uniform Laws Potpourri in Estate Planning*" ABA Section of Real Property, Trust & Estate Law Spring 2018 Symposia, Orlando, Florida, April 2018.

"Fiduciary Law, Risk, and Litigation," Annual Wealth and Trust Program, American Bankers Association, St. Louis, Missouri, April 2018.

"Estate and Gift Taxation" and *"Generation Skipping Transfer Taxation,"* 2018 Wills, Trusts and Estates Certification Course and Advanced Practice Update, Orlando, Florida, April 2018.

"*The Intersection of Technology and Ethics,*" Texas Tech University School of Law's Estate Planning CLE and Expo, Lubbock, Texas, March 2018.

"*Post-Mortem Estate Planning,*" Florida Tax Institute, Tampa, Florida, February 2018.

"Construction Issues Concerning Modern Family Terms in Old and New Estate Planning Documentation," Distinguished Speaker Series, Community Foundation of Sarasota County, Sarasota, Florida, November 2017.

"Estate Planning Drafting and Probate Litigation Issues," Distinguished Speaker Series, Community Foundation of Manatee County, Bradenton, Florida, November 2017.

"GRATs, GRUTs, and QPRTS," American College of Trust and Estate Counsel's Florida Fellows Institute, Tampa, Florida, October 2017.

"Unique Assets in Estate Administration: Intellectual Property," ABA Trusts & Estates Law Division's CLE Webinar, October, 2017.

"*Fiduciary Administration III: State Law & Practice*," American Bankers Association's National Trust School and Graduate Trust School, Atlanta, Georgia, September 2017.

"Unique Assets in Estate Administration: Firearms," ABA Trusts & Estates Law Division's CLE Webinar, September, 2017.

"Document Construction Issues in Old and New Instruments in a Post-Obergefell World," ABA Section of Taxation Fall CLE Meeting, Austin, Texas, September 2017.

"Individual Right to Carry: The Potential Impact of Nationwide Concealed Carry Reciprocity, ABA Center for Professional Development, CLE Webinar, August, 2017.

"Estate Planning Basics," ABA Trusts and Estates Law Division CLE Program, Chicago, Illinois, July 2017.

"Tax Ethics," Ullman Year in Review, The Florida Bar Tax Section, Amelia Island, Florida, July 2017.

"*The Art of the Steal,*" The Institute for Learning in Retirement, Gainesville, Florida, April 2017.

"*Estate Planning for Intellectual Property,*" Ava Maria Estate Planning Conference, Naples, Florida, April, 2017.

"If my Grandson becomes my Granddaughter, Will She Still Get the Farm? Document Construction Issues Raised by Changing Concepts of Family, Gender, and Race," ABA Section of Real Property, Trust & Estate Law Spring 2017 Symposia, Denver, Colorado, April 2017.

"*The Year In Review and Hot Topics*," ABA Section of Real Property, Trust & Estate Law Spring 2017 Symposia, Denver, Colorado, April 2017.

"Estate and Gift Taxation" and *"Generation Skipping Transfer Taxation,"* 2017 Wills, Trusts and Estates Certification and Course and Advanced Practice Update, Orlando, Florida, April 2017.

"*Gun Trusts,*" Texas Tech University School of Law's Estate Planning CLE and Expo, Lubbock, Texas, March 2017.

"*The Law of the Dead,*" Wake Forest University School of Law, Winston Salem, North Carolina, February 2017.

"*Charitable Planning*," American College of Trust and Estate Counsel's Florida Fellows Institute, Fort Lauderdale, Florida, November 2016.

"*The Retroactive Impact of Obergefell*," 42nd Annual Notre Dame Tax & Estate Planning Institute, South Bend, Indiana, October 2016.

"*LGBT Family Law Considerations and Practice Tips*," American Bar Association Fall Meeting, Detroit, Michigan, October, 2016.

"*Nationwide Marriage Equality Revisited,"* ABA Section of Taxation Fall CLE Meeting, Boston, Massachusetts, September 2016.

"*Fiduciary Administration III: Making Complex Fiduciary Decisions*," American Bankers Association's National Trust School and Graduate Trust School, Atlanta, Georgia, September 2016.

"*Fiduciary Administration II: State Law & Practice*," American Bankers Association's National Trust School and Graduate Trust School, Atlanta, Georgia, September 2016.

"*Estate Planning for Firearms*," Georgia, Illinois, Nebraska, North Carolina, Vermont Bar Associations webinar, September, 2016.

"*Asset Protection Trusts: Pros and Cons*," Oklahoma City University School of Law's Conference on Trusts & Estates Meets Gender, Race and Class, Oklahoma City, Oklahoma, September 2016.

"*The Truth About Gun Trusts:* What You Need to Know to Better Serve Your Clients," American Bar Association's eCLE, August 2016.

"*The Art of the Steal,*" The Institute for Learning in Retirement, Gainesville, Florida, July 2016.

"*The Benefit-of-the-Beneficiary Rule*," The Florida Bar's Real Property, Probate & Trust Law Section Executive Council Meeting, Orlando, Florida, June 2016.

"*Retroactivity Issues Regarding Same-Sex Marriage Recognition,*" St. Petersburg Bar Association, St. Petersburg, Florida, June 2016.

"*Retroactivity Issues Regarding Same-Sex Marriage Recognition,*" Martin County Estate Planning Council, Stuart, Florida, May 2016.

"*Practical Planning for Truly Unique Assets: From Snowflakes to Marijuana*," ABA Section of Real Property, Trust & Estate Law Spring 2016 Symposia, Boston, Massachusetts, May 2016.

"*Non-Tax Hot Topics Including an Update on the Digital Revolution*," ABA Section of Real Property, Trust & Estate Law Spring 2016 Symposia, Boston, Massachusetts, May 2016.

"*Equal Justice Under Law: Nationwide Marriage Equality (Almost),*" ABA Section of Real Property, Trust & Estate Law Spring 2016 Symposia, Boston, Massachusetts, May 2016.

"*Elimination of Bias in the Profession: An LGBT Ally Toolkit,*" ABA Section of Real Property, Trust & Estate Law Spring 2016 Symposia, Boston, Massachusetts, May 2016.

"*Estate Planning Basics,*" ABA Section of Real Property, Trust & Estate Law Community Outreach Program, Boston, Massachusetts, May 2016.

"*Estate Planning for Artists, Authors, and other Copyright Owners,*" Ava Maria Estate Planning Conference, Naples, Florida May, 2016.

"*What I Wish I knew When I Started Practicing Law—Practical Advice for Estate Planners Young and Old,*" Ava Maria Estate Planning Conference, Naples, Florida May, 2016.

"*Woman in Gold: Recovery of Stolen Cultural and Artistic Property,*" The Institute for Learning in Retirement, Gainesville, Florida, April 2016.

"*Tax Considerations Parts I, II, and III,*" 2016 Wills, Trusts and Estates Certification and Course and Advanced Practice Update, Orlando, Florida, April 2016.

"*Retroactivity Issues Regarding Same-Sex Marriage Recognition,*" 2016 American College of Trust & Estate Counsel Annual Meeting, Las Vegas, Nevada, March 2016.

"*Who Gets to Make the Rules—Settlors or Beneficiaries,*" Florida Bar Continuing Legal Education Committee and the Florida Bar Real Property Probate Trust Law Section, Tampa, Florida, March 1016.

"*Benefit-of-the-Beneficiary: How Trustees Must Server Their Beneficiary,"* All Children's Hospital's Annual Estate, Tax, Legal & Financial Planning Seminar, St. Petersburg, Florida, February 2016.

"*Same-Sex Marriage Issues: Construction, Drafting, and Public Policy,*" ABA Trusts & Estates Law Division's CLE Webinar, November 2015.

"*What Every Estate Planner Needs to Know about Firearms*," ABA Section of Real Property, Trust & Estate Law's Professors' Corner, November 2015.

"Estate Planning Basics," ABA Trusts and Estates Law Division's Outreach Program, Chicago, Illinois, September 2015.

"*Whether to Marry and What to Consider,*" Bloomberg BNA Tax & Accounting Webinar, September 2015.

"*Obergefell v. Hodges: Tax and Estate Planning Issues for Employers and Individuals*," ABA Section of Taxation Fall CLE Meeting, Chicago, Illinois, September 2015.

"*Obergefell*: *Remaining Tax and Estate Planning Issues,"* ABA Section of Taxation Fall CLE Meeting, Chicago, Illinois, September 2015.

"*Elimination of Bias in the Profession: The Influence of Cultural Differences on Estate, Tax, and Employment Benefit Planning,"* ABA Section of Taxation Fall CLE Meeting, Chicago, Illinois, September 2015.

"*Generation-skipping Transfer Tax Issues and Updates,"* 35th Annual Attorney/Trust Officer Liaison Conference, Palm Beach, Florida, August 2015.

"*Have Gun Trust, Will Travel: How to Design, Draft and Implement Gun Trusts*," Bloomberg BNA Tax & Accounting Webinar, August 2015.

"*Closing the Estate: From Undertaker to Litigator and Steps in Between: The Role of the Paralegal in Estate Administration, Distribution and Resolution*," ABA Section of Real Property, Trust & Estate Law's eLearning Program, August 2015.

"*Same-Sex Marriage on the Cusp: Remaining Issues of Non-Recognition and a Look into the Future*," The ABA Annual Showcase Program, Chicago, Illinois, August 2015.

"*Hot Topics and Recent Developments in Estate Planning and Administration,*" ABA Trusts & Estates Law Division's CLE Webinar, May 2015.

"Non-Tax Issues Affecting the Planning and Administration of Estates and Trusts," ABA Trust & Estate Law Division's National Teleconference, May 2015.

"*Recent Cases and Trends in Non-Tax Estate Planning*," ABA Section of Real Property, Trust & Estate Law Spring 2015 Symposia, Washington, D.C., May 2015.

"The Benefit-of-the-Beneficiary Rule," American College of Trust and Estate Counsel 2015 Annual Meeting, Marco Island, Florida, March 2015.

"Same-Sex Marriage on the Cusp: Remaining Issues on Non-Recognition and Guesses about the Future," ABA Trust & Estate Law Division's Webinar, March 2015.

"The History, Impact, and Future of the Benefit-of-the-Beneficiary Rule," Florida Bar Association: Section on Real Property, Probate and Trust. Law, Orlando, Florida, March 2015.

"*Same-Sex Marriage: Retroactivity and Prospectivity,"* Florida Bar Association: Section on Real Property, Probate and Trust. Law, Orlando, Florida, March 2015.

"*Getting Started: From Undertaker to Litigator and Steps in Between: The Role of the Paralegal in Estate Administration, Distribution and Resolution*," ABA Section of Real Property, Trust & Estate Law's eLearning Program, January 2015.

"Benefit-of-the-Beneficiary Rule: How Trustees Must Serve Their Beneficiaries," 40th Annual Notre Dame Tax & Estate Planning Institute, South Bend, Indiana, November 2014.

Presenter at ABA Real Property, Trust & Estate Law Fall Leadership Meeting, Laguna Beach, California, November 2014.

"Asset Protection Planning for LGBT Clients After the Windsor Case," ABA Section of Taxation Fall CLE Meeting, Denver, Colorado, September 2014.

"Pardon the Mess: Jurisdictional Issues in a Post-DOMA World," ABA Section of Taxation Fall CLE Meeting, Denver, Colorado, September 2014.

"The Evolution of the Benefit-of-the-Beneficiary Rule," American College of Trust and Estate Counsel Florida AnnHual Meeting, Palm Beach, Florida, July 2014.

"2014 Hot Topics in Estate Planning," ABA Trust & Estate Law Di vision's CLE Webinar, May 2014.

"Non-Tax Issues Affecting the Planning and Administration of Estates and Trusts," ABA Trust & Estate Law Division's National Teleconference, May 2014.

"*The Benefit of the Beneficiary Rule*," ABA Section of Real Property, Trust & Estate Law Spring 2014 Symposia, Chicago, Illinois, May 2014.

"*Non-Tax Estate Planning Considerations in Light of Recent Cases and Trends*," ABA Section of Real Property, Trust & Estate Law Spring 2014 Symposia, Chicago, Illinois, May 2014.

"*Estate Planning Basics*," ABA Section of Real Property, Trust & Estate Law Community Outreach Program, Chicago, Illinois, April 2014.

"*Arbitrating Trust Disputes*," ABA Section of Real Property, Trust & Estate Law's Professors' Corner, March 2014.

"*Drafting Documents*," ABA Section of Real Property, Trust & Estate Law's eLearning Program, February 2014.

"*Because It Wasn't Complicated Enough – Estate Planning Issues For Same-Sex Couples In The Wake Of The Supreme Court's Recent Decisions*," 48th Annual Heckerling Institute on Estate Planning, Orlando, Florida, January 2014.

Panelist, "*(Same) Sex Ed: Practical Tips and Tricks When Planning for Same-Sex Couples*" 48th Annual Heckerling Institute on Estate Planning, Orlando, Florida, January 2014.

"*Estate Planning After the Windsor Ruling*," Greater Boca Raton Estate Planning Council, Boca Raton, Florida, October 2013.

"*Arbitration of Internal Trust Disputes,*" Southeastern Association of Law Schools Conference, Palm Beach, Florida, August 2013.

Panelist, "*Trusts and Estates Scholarship and Pedagogy,*" Southeastern Association of Law Schools Conference, Palm Beach, Florida, August 2013.

"Hot Topics, Cases and Trends in Estate Planning," ABA's Trust & Estate Law Division's National Teleconference, May 2013.

Commentator, *"Paternity and Artificial Insemination,"* The Law and Society Association Annual Meeting, Boston, Massachusetts, May 2013.

"*Non-Tax Estate Planning Potpourri*," ABA Section of Real Property, Trust & Estate Law Spring 2013 Symposia, Washington, D.C., May 2013.

Panelist, "*Estate Planning and Tax Issues for Artists and Artist-Endowed Foundations*," The Aspen Institute's National Study of Artist-Endowed Foundations, New York, New York, November 2012.

"*Fundamental Duties of Trustees – and Where Trustees Go Wrong*," The 2012 Special Needs Trusts National Conference, St. Petersburg, Florida, October 2012.

Panelist, "*Ethical Dilemmas in Elder Law: New Ideas and Challenges for Teaching and Practice,*" Southeastern Association of Law Schools Conference, Amelia Island, Florida, July 2012.

"*Hot Topics in Non-Tax Trusts and Estates Issues*," ABA Section of Real Property, Trust & Estate Law Spring 2012 Symposia, New York, New York, May 2012.

"Encapsulated Trusts & Estates," International Journal of Arts & Sciences Conference, Vienna, Austria, April 2012.

"*Limitations of Law and Economics in Trust Law*," New York Law School, New York, New York, December 2011.

"*A Stewardship Theory of Trust Law*," University of Cincinnati College of Law, Cincinnati, Ohio, November 2011.

"*Limitations of Law and Economics in Trust Law*," Stetson University College of Law, St. Petersburg, Florida, October 2011.

"*Estate Planning Issues for the Sandwich Generation*," ABA Section of Real Property, Trust & Estate Law Spring 2011 Symposia, Washington, D.C., May 2011.

"*Estate Planning Issues for Copyright Holders,*" ABA's Trust & Estate Law Division's Non-Tax Estate Planning Considerations Group National Conference Call, October 2010.

"*A Non-Tax Buffet*," ABA Section of Taxation and the Trust & Estate Law Division Joint Fall Meeting, Toronto, Canada, September 2010.

Moderator, *"Panel on the Changing Worlds of Trusts and Estates,"* Southeastern Association of Law Schools Conference, Palm Beach, Florida, August 2010.

"The Limitations of Neo-Classical Agency Cost Theory as Applied to Trust Law," University of Georgia Law School, Athens, Georgia, March 2010.

Commentator, *"Panel: Changing Times, Changing Law: Evaluating Legal Trends in Trusts and Estates Law,"* The Association of American Law Schools Section on Donative Transfers, New Orleans, Louisiana, January 2010.

"New Frontiers in Estates, Trusts and Elder Law," University of Florida Grand Guard Reunion, Gainesville, Florida, November 2009.

"A Non-Tax Cornucopia," ABA Section of Real Property, Trust & Estate Law Spring 2009 Symposia, Washington D.C., April 2009.

"Hot Issues in Trusts & Estates," ABA Section of Taxation and the Trust & Estate Law Division Joint Fall Meeting, San Francisco, California, September 2008.

"Intent Effectuating Default Rule Theory for Property Succession Law," The Law and Society Association Annual Meeting, Montreal, Quebec, Canada, June 2008.

Chaired Roundtable Discussion on "*Same-Sex Tax Issues in Transnational Perspective: Canada and the United States,"* The Law and Society Association, Montreal, Quebec, Canada, June 2008.

"An Unadulterated Functional-Based Approach to Intestacy Law," University of Missouri School of Law, Columbia, Missouri, February 2008.

"The Legal Legacy of Anna Nicole Smith," Florida Tomorrow $1 Billion Dollar Kick-off Fundraiser, University of Florida , Gainesville, Florida, September 2007.

"*Estate Planning Issues and Strategies for Non-Traditional Families,*" University of Miami Law School, Miami, Florida, January 2007.

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MEMBERSHIPS:

Bar Memberships – Florida (1998), New York (1998), and California (2002).

American Bar Association: Sections on Real Property, Trust and Estate Law, and Taxation.

Florida Bar Association: Section on Real Property, Probate and Trust. Law.

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