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
Professor of Law and Member of the Graduate Tax Faculty – August 2011 to present
Director, The Center for Estate Planning & Business Succession – 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; Estate Planning; Fiduciary Administration, Federal Estate & Gift Taxation, Income Tax, Advanced Topics in Estate Planning.
- 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.
- John Marshall Bar Association College of Law Lifetime Achievement Award for Teaching: 2012.
- University of Florida's Impact Award: 2012.
- BALSA Outstanding Mentor: 2008; 2011.
- College of Law service commitments include serving on the Curriculum Committee and the Judicial Clerkships & Student Placement Committee, as well as serving as the Director of the Estate Planning Practice Certificate Program, Supervisor of Probate Externships, and Faculty Advisor to The Estates and Trusts Law Society. Previously served on the Student Admissions Committee; the Academic Standards Committee; and the Diversity & Community Relations Committee.
- University service includes serving on the Concerns Committee; serving as a speaker and advisor to the Institute on Aging at the University of Florida Health Science Center; and serving as a speaker and advisor for the University of Florida Foundation.
- 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.

Co-Chair, Non-Tax Issues Affecting the Planning and Administration of Estates and Trusts Committee of the Real Property, Trusts and Estates Law Section of the American Bar Association – 2010 to present.

Vice-Chair, Legal Education Committee of the Trusts and Estates Law Section of the American Bar Association – 2015 to present.

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.

Vice Chair, Standing Committee on Community Outreach, the Real Property, Trusts and Estates Law Section of the American Bar Association – 2013 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 2020).

The Decline of Trust Exceptionalism (forthcoming 2020).

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

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

The Stranger-to-the Marriage Doctrine, 2019 WIS. L. REV. 101.

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:

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:

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:

"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, September 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.

"*Sperms & Estates: A Functional Based Approach to Intestacy Laws,*" Southeastern Association of Law Schools Conference, Palm Beach, Florida, July 2006.

"*Estate Planning Issues for Visual Artists,*" Cultural Council of Jacksonville, Florida, May 2006.

MEMBERSHIPS:

Bar Memberships – Florida (1998), New York (1998), New Jersey (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.

American College of Trust and Estate Counsel.

Copyright Society of the USA.

SELECTED PRESS APPEARANCES:

Interviewed on OutFront with Erin Burnet about Trump tax issues, CNN, March 1, 2019.

Substantially quoted in "*Legal obstacles to pursuing tax charges against Trump family,*" The Hill, October 5, 2018.

Interviewed on NBC Nightly News with Lester Holt about Trump Family tax issues, NBC, October 3, 2018.

Interviewed by NPR about Trump Family tax issues, October 3, 2018.

Interviewed on P.O.T.U.S. about Trump Family tax issues, Sirius XM, October 3, 2018.

Substantially quoted in "*Trump's One Weird Trick to Getting Rich, Revealed!: Outright Fraud, Deceptive Tax Schemes, and a Lifetime Allowance from Daddy,*" Vanity Fair, October 3, 2018.

Substantially quoted in *"Did the Trump family's tax practices break the law? An expert explains.,*" Vox, October 3, 2018.

Substantially quoted in "*A financial disclosure from Donald Trump's sister led to The New York Times report on his taxes*," CNN Politics, October 3, 2018.

Substantially quoted in "*UF law professor weighs in on Trump finances*," Gainesville Sun, October 3, 2018.

Interviewed on Anderson Cooper 360 about Trump Family tax issues, CNN, October 2, 2018.

Substantially quoted in and tax expert on "*Trump engaged in suspect tax schemes as he reaped riches from his father*," The New York Times, October 2, 2018 (winner of the Pulitzer Prize).

"*Fate of Ailes Harassment Lawsuits Unclear After Death*," U.S. News & World Report, May 2017.

"*Roger Ailes, former Fox News Chief, Dies at 77*," Reuters, May 2017.

"*Gun Trust Loophole Closed, Background Checks For All*," Forbes Magazine, July 13, 2016.

"*The Lawyers Behind the 0.1 Percent*," The American Lawyer, May 31, 2016.

Substantially quoted in "*Financial Downsides and Complications to Same-Sex Marriage,"* USA Today, June 26, 2015.

Substantially quoted in *"All Things Financial Now the Same for Same-Sex Married Couples,"* USA Today, June 26, 2015.

"Gun Trusts," Illinois State Bar Section on Trusts & Estates Magazine, vol. 61, June 2015.

Substantially quoted in *"A Lawyer Explains Why Sophia Vergara's Ex Has No Case,"* Elle Magazine, April 2015.

Quoted in *"Legalizing Same-Sex Marriage is Just the First Step,"* The Independent Florida Alligator, June 29, 2015.

Substantially quoted in "A Woman's Right to Move," Slate Magazine, November 25, 2013.

Substantially quoted in "*When is a Sperm Donor a Dad?*," Slate Magazine, August 14, 2013.

Quoted in "*Mixed Benefits of DOMA Decision for Gay Couples in Florida*," Tampa Bay Times, June 30, 2013.

Interviewed about the U.S. Supreme Court decisions in Windsor and Perry, including WCJB News (ABC-affiliate), GTN News (CBS-affiliate), WUFT (NPR affiliate); WJCT (NPR affiliate), and WFSQ (NPR affiliate), June 26, 2013.

Substantially quoted in "*Brenda Heist: How to Come Back from the Dead*," B.B.C. (British Broadcasting Corporation) News Magazine, May 2, 2013.

Background interviewed by MSNBC and the U.K. Guardian concerning various issues concerning Michael Jackson's estate (2009).

Quoted in "*Years Old Will Adds to Chaos After Death of a Celebrity*," New York Times, February 17, 2007.

Quoted in "*Son Fights to Prove Father was Murdered*," Orlando Sentinel, October 26, 2007.

Quoted in "*Tours and Presentations Kick Off Campaign*," The Gainesville Sun, September 28, 2007.

Quoted in "*Beaver County Widow Sedated When Will Was Changed*," Pittsburg Tribune Review, April 28, 2007.

Quoted in "*There's a Will, but There's No Way*," Houston Chronicle, February 17, 2007

Quoted in "*Movie-Inspired Group Displays Acts of Kindness*," The Independent Florida Alligator, February 26, 2007.

Quoted in "*A New Place to Call Home*," The Gainesville Sun, September 28, 2005.

Interviewed by MSNBC, The Palm Beach Post, and W.R.U.F. AM concerning Anna Nicole Smith's will and the subsequent trial concerning the disposition of her corpse.