

# WILLIAMS PARKER

## HARRISON DIETZ & GETZEN

ATTORNEYS AT LAW  
EST. 1925

### ESTATE PLANNING, BUSINESS SUCCESSION, ESTATE & TRUST ADMINISTRATION

For decades, families of means have established residency in Florida to take advantage of the state's favorable taxes and our warm weather. Since 1925, we have counseled generations of those families.

Many of our clients have multiple residences in other states or countries. A number of our clients are executives with corporations that have relocated their national or international headquarters to the region. All of our clients have high standards; they expect excellent service, up-to-date advice, and discretion. Based on those expectations, we have built one of Florida's largest and most sophisticated estate planning and administration practices. Typically, our practitioners have at least one advanced degree in taxation, accounting, or business, and many have an LL.M. in tax. Additionally, many of our practitioners are certified by The Florida Bar as specialists in will, trusts, and estates law or tax law. Our estates and trusts attorneys have authored multiple texts on the subject and frequently present on topical issues.

Our estates and trusts attorneys are regularly engaged to provide the legal framework to address business succession, estate planning, tax planning, [charitable giving](#), and retirement planning goals as part of the smooth transition of our clients' businesses and estates to future owners and beneficiaries. This includes both lifetime and postmortem planning. Additionally, when necessary, our estate and trust attorneys represent clients, or their fiduciaries, in litigated estate and trust administration proceedings and in tax controversies involving estate and gift tax matters. We also have substantial experience working with family offices and a long history of coordinating with non-Florida lawyers and handling the Florida-specific portions of client representations.

Confidential representations include:

- Legal counsel for \$400 million plus complex estate predominantly comprised of business assets and post-death business and tax restructuring of the same
- Legal counsel for large and highly complex estate involving over 100 business entities; successfully negotiated a zero tax change under audit
- General counsel to several \$100 million plus entrepreneurs and their organizations
- General counsel to \$100 million plus charitable foundations
- Extensive audit experience in serving as counsel representing estate and gift tax challenges and disputes including complex business valuations, FLPs, and other complex tax issues
- Tax and estate counsel in the preparation of Private Letter Rulings for complex estate and gift tax matters