

WILLIAMS PARKER

HARRISON DIETZ & GETZEN

ATTORNEYS AT LAW
EST. 1925

John Berteau is a fellow of the American college of Trusts and Estate Counsel. He focuses on estate planning and estate administration.

John helps clients use sophisticated wills, trusts, and closely held entities to transfer assets during lifetime and upon death while triggering the least amount of transfer taxes possible and reduce the costs and time to settle an estate. When advising high net worth individuals and family business owners, John helps clients dispose of their assets during life and at death in a manner which meets their personal goals. In the course of these representations, works extensively with banks, corporations, trustees, executors, and money managers.

John chairs the Patterson Foundation—one of Florida's largest and most progressive foundations.



John T. Berteau

Counsel

T: (941) 329-6607

E: jberteau@williamsparser.com

EDUCATION

LL.B., **Duke University**

B.A., **Duke University**

PRACTICES

Estate Planning, Business Succession, Estate & Trust Administration

ADMISSIONS & LICENSURE

Bar

Florida

Courts

Supreme Court of the United States

HONORS

Martindale-Hubbell, AV Preeminent

Florida Super Lawyers, 2006-2016

Best Lawyers, 2007-2018

Top Rated Lawyer in Trusts and Estates Law selected by American Law Media and Martindale-Hubbell, 2014

PUBLICATIONS & PRESENTATIONS

Steps to Avoid Beneficiary Conflicts Over Bequests of Tangible Property

Estate Taxes-Now or Later

Estate Planning in Florida
Estate Planning in Tennessee
Living Trusts
When your Client Wins the Lottery - Tax and Estate Planning Issues
Estate and Gift Tax Returns and Audits

BAR & CIVIC ENGAGEMENT

American College of Trusts and Estates Counsel (ACTEC),
Fellow

Patterson Foundation, Chairman; **Sarasota Memorial
Healthcare Foundation**, Past Chairman

Southwest Florida Hospice Foundation, Past Chairman

Friends of Selby Library, Past Chairman

Siesta Key Utilities Authority, Past Chairman

Sarasota Chamber of Commerce, Past Director and Legal
Counsel

Sarasota Bay Rotary Club, Past President; Paul Harris Fellow