

# 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

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### 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

#### PROFESSIONAL & 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