



Jeffrey M. Gad

EXPERIENCE

Jeffrey Gad focuses his practice on representing individuals emphasizing a broad range of probate, business and taxation related issues. His practice integrates the personal and estate tax planning concerns of individuals with tax and business planning for their closely-held businesses. As part of his corporate practice, Jeffrey assists businesses with choice-of-entity planning, the formation of business entities, business contracts, such as the preparation, review and negotiation of operating agreements and shareholder agreements. In addition to his corporate practice, Jeffrey has extensive experience in all aspects of probate and trust administration, including the preparation of estate tax returns. Jeffrey is also experienced in probate, trust and guardianship litigation and appeals, including will and trust contests and cases involving capacity, undue influence, determination of beneficiaries, homestead challenges, powers of attorney, spousal elective share, estate claims, breach of fiduciary duty, and tortious interference with inheritance. He also represents clients with IRS audits and investigations and has successfully resolved estate tax audits involving valuation issues raised by the use of family limited partnerships in estate planning.

REPRESENTATIVE EXPERIENCE

- Litigation support in probate and trust litigation matters and in cases involving homestead disputes
- Asset protection and business planning, including the use limited partnerships and limited liability companies (LLCs), and the various exemptions available under Florida law, including homestead and tenancy by the entirety
- Planning for the future of closely held businesses, including buy-sell agreements, liquidity needs, transfer tax consequences of various alternatives, and structuring of purchases and sales of such entities consistent with family financial planning for the future
- Representation of taxable and non-taxable estates and trusts, including tax questions, will and trust interpretations and court filings
- Work with clients on post-mortem planning, including trust reformations, disclaimers, as well as the preparation of federal estate tax returns

DISTINCTIONS & MEMBERSHIPS

- *The Best Lawyers in America*®, Since 2013, Listed in Florida for Trusts and Estates and Tax Law
- *Florida Trend's Legal Elite*, 2015-2019, Listed for Wills, Trusts & Estates Law
- The Florida Bar, Tax and Real Property and Probate Sections, Member
- Hillsborough County Bar Association, Real Property and Probate Division, Member
- Congregation Kol Ami, Vice President and Member of Board of Trustees
- Jewish National Fund of Tampa Bay, Board Member
- JCRC of Tampa Bay, Former Committee Member
- Hillsborough Education Foundation, Former School Enrichment Committee Member



PARTNER

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EDUCATION

- LL.M., New York University School of Law, 2000; Taxation
- J.D., Nova Southeastern University, Shepard Broad Law Center, 1999; *magna cum laude*
- B.S.B.A., University of Florida, 1994