



## Jeffrey A. Baskies

Jeffrey A. Baskies is a graduate of Trinity College (B.A., with highest honors, 1988) and Harvard Law School (J.D., cum laude, 1991). He is admitted to the bar in Florida and Massachusetts.

Jeff is a Fellow of The American College of Trust and Estate Counsel (ACTEC), and he is a member of its Family Law Task Force. ACTEC is "an international organization of approximately 2,500 lawyers peer-elected to membership by demonstrating the highest level of integrity, commitment to the profession, competence, and expertise in the preparation of wills and trusts, estate planning, probate, trust administration and related practice areas."

Jeff routinely advises wealthy families, entrepreneurs, athletes, celebrities and other clients regarding wealth transfer planning and asset protection planning. As part of his diverse practice, Jeff counsels clients on charitable planning, life insurance planning, multiple-generational tax planning and all manner of complex trust planning. In his advisory

capacity, Jeff often collaborates with clients' family offices. Integrated in his practice, Jeff provides asset protection planning both for clients and for their beneficiaries. When clients need post-death assistance, Jeff advises on probate and trust administrations as well as Form 706 preparation and estate tax audits. When cases become adversarial, Jeff frequently represents clients in probate litigations, including beneficiary representations, will and trust contests and fiduciary litigation.

Attorney

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In addition to his traditional trusts and estates practice, Jeff has drafts and negotiates many complex pre-marital and post-marital agreements. He also represents clients with respect to their closely-held business needs, including: forming business entities, business succession planning, drafting operating agreements, shareholders' agreements and buy-sell agreements and representing clients through business transactions.

Having passed a rigorous exam and meeting on-going continuing legal education requirements, Jeff is Certified by the Board of Legal Specialization and Education of The Florida Bar as a specialist in Wills, Trusts and Estates law, allowing him to hold himself out as an "expert" in the field. Not only is Jeff a board-certified attorney, but he also gives back to the board certification program by annually teaching "Homestead" law to new certification candidates at the Florida Bar's board certification exam review course. Homestead issues are a true specialty for Jeff, as he has been involved (as drafter, advocate or otherwise) in many of the state's leading Homestead cases. In addition, Jeff has frequently lectured throughout the state of Florida to estate planning counsels, tax counsels, the Attorney-Trust Officer liaison conference and numerous Florida bar CLE programs on Homestead and other topics.

An avid writer, Jeff is a frequent author and contributor to trusts and estates publications. He is the successor author of a treatise entitled: *Estate, Gift, Trust and Fiduciary Tax Returns: Planning and Preparation*, published by Thomson Reuters/Westlaw (updated and published annually since 2013). In addition to the treatise, Jeff has authored over 150 articles for professional publications, including: Estate Planning, Trusts & Estates, Tax Management: Estates Gifts and Trusts Journal, Lawyers Weekly USA, The Family Advocate, The Florida Bar Journal, ActionLine, Probate and Property, Life-underwriters Association News, M.D. News, and The Elder Law Advocate. Plus, he is a commentator and frequent contributor to the popular on-line estate planning newsletter service, Leimberg Information Services, Inc. ("LISI").

The Florida Bar has also called upon Jeff to author chapters in several Bar-published treatises, entitled: *Basic Estate Planning in Florida*, *Drafting Marriage Contracts in Florida*, *Administration of Trusts in Florida* and *Basic Guardianship Practice in Florida*.

Active in the Florida Bar's Real Property, Probate and Trust Law Section (RPPTL), Jeff has served on the Section's Executive Council for many years. He is also a member of several RPPTL committees, including: Probate Law Committee (past chair of homestead law subcommittee), Charitable Organizations and Planning Committee (past vice-chair), Trust Law Committee, Homestead Problem Study Committee (current vice-chair), Probate Litigation Committee, Trusts and Estates Tax Law Committee, the RPPTL's 2019 Strategic Planning Committee and its Homestead law ad hoc committee, where Jeff participated in drafting a number of Florida's homestead laws. Currently, and for many years, Jeff has served as Co-Chair of the Publications Committee of the RPPTL Section,

acting as co-publisher and co-editor-in-chief of the Section's ActionLine magazine. In 2018, Jeff was bestowed one of the RPPTL Section's highest honors, the John Arthur Jones Annual Service Award, presented to a RPPTL Section member "rendering dedicated and significantly outstanding service to the Section".

During his career, Jeff has been recognized as a leading attorney by many peer-rating services. For decades, he has been AV<sup>®</sup> rated by Martindale Hubbell, its highest rating for skill and ethics. Since 2008, Jeff has been annually included in Best Lawyers in America<sup>®</sup>, a rigorous peer review designation recognizing "the top 4% of attorneys in the country". In 2013, Best Lawyers named Jeff the South Florida Trusts & Estates "Lawyer of the Year". In 2005, 2006 and 2008, Jeff was named by Robb Report's Worth magazine as one of the "Top 100 Attorneys" in the country for affluent clients. Since its inception in 2006, Jeff has been included in Florida's Super Lawyers annual list of the "top 5%" of Florida lawyers. In addition, each year from 2009-2021, Super Lawyers has listed Jeff as one of Florida's "Top 100 Lawyers", and in 2014 Super Lawyers named him one of Florida's "Top 10 Lawyers". Additionally, since 2006, Jeff has been listed among the "Legal Elite" in Florida Trend Magazine's annual surveys of the "top 2%" of Florida lawyers, and in 2019 he was inducted into the Legal Elite "Hall of Fame".

During his career, Jeff has been frequently quoted as a tax and probate expert in local and national newspapers and periodicals including Money, Forbes, New York Times, Wall Street Journal, USA Today, Boston Globe, Miami Herald, and many others. He has also been a featured expert commentator on local and national television affiliates for NBC, CBS, ABC, Fox and other media. During the Ted Williams probate litigation in the early 2000s, Jeff was sought out by many national media outlets for commentary, including a quote on the front page of USA Today, appearances on all of the major television stations in Boston, and many guest appearances on Boston radio stations (highlighted by several interviews on "The Big Show" with Glenn Ordway). After the death of Anna Nicole Smith, he was again sought out by many national media outlets for expert commentary. Jeff was quoted on NBC and ABC, he was quoted in newspapers and websites (including CNN.com and msnbc.com), and he was interviewed on TV by Sue Herera on "The Power Lunch" on CNBC.

In addition to his experiences as an advisor to clients, Jeff spent four years of his career (2000-2004) as President and CEO of a national legal newspaper publishing company, Lawyers Weekly, Inc. He helped grow this closely-held business and led its sale to another media company. Jeff's experiences as a CEO combined with his experiences overseeing the sale of the business provide him unique insights into the needs of his clients.

## Practices

- [Estate Planning](#)
- [Estate and Trust Administration](#)
- [Wealth Preservation and Asset Protection](#)

- Premarital and Postmarital Agreements
- Income Tax Advice
- Estate & Trust Litigation
- Tax-Exempt Organizations and Charitable Planning
- Business Planning
- Real Estate

## Education

- Harvard Law School, J.D., cum laude, 1991
- Trinity College B.A., with highest honors, 1988