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Thomas O. Katz

Thomas O. Katz is a graduate of The Wharton School of the University of Pennsylvania (B.S. in Economics, 1979) and received his law degree from Georgetown University Law Center (J.D., cum laude, 1982). Mr. Katz is Board Certified by The Florida Bar in Tax Law. He has been selected repeatedly as one of the Best Lawyers in America (2020 "Lawyer of the Year" in Tax Law in Ft. Lauderdale), as a Florida SuperLawyer (included on the "Top 100" list), and as a "Legal Leader in Florida." He has also been recognized as one of the Florida Trend's "Legal Elite." Martindale Hubbell has constantly awarded Mr. Katz an "AV" rating, the highest rating for skill and ethics by this legal peer-review rating service.

Mr. Katz's diverse practice covers federal and state income tax, estate and gift tax planning, and state corporate, limited liability company and partnership law. This experience provides him with the ability to structure transactions to meet the tax and business needs of the Firm's clients. In

particular, he addresses the needs of those clients of the Firm whose business endeavors must be structured to assist in maximizing opportunities to transfer wealth to later generations. He is also engaged in assisting clients through the process of administering trusts and estates.

Mr. Katz is involved in the community and serves on the governing boards for a variety of local, state and national charitable organizations. A frequent lecturer on planned charitable giving, Mr. Katz helps structure gifts to charities that provide benefits for both donors and the organizations. He also is involved in advising charitable organizations on how to obtain and maintain their federal income tax exemption, as well as how to conduct activities that may give rise to unrelated business income.

Mr. Katz's experience as a member of boards of directors, serving on and chairing finance and investment committees, serving on boards of private foundations and public charities, serving as personal representative and

trustee, facilitator for family meetings, and similar experiences, have enabled him to serve as a family counselor to a variety of families.

Mr. Katz is a member of the Florida Bar, American Bar Association, and the United States Tax Court. His community and civic memberships have included: Community Foundation of Broward (Past Chair, Board of Directors; Past Chair of Professional Advisory Council); University of Pennsylvania – Herbert D. Katz Center for Advanced Judaic Studies (Past Chair, Board of Overseers); Joe DiMaggio Children’s Hospital Foundation and Memorial Hospital Foundation (Former Member of Board of Directors); National Museum of American Jewish History (Former Member of Board of Directors); CLAL – The National Jewish Center for Learning and Leadership (Board of Directors, past Chair); and Diabetes Research Institute Foundation, Inc. (General Counsel).

Practices

- Estate Planning
- Estate and Trust Administration
- Wealth Preservation and Asset Protection
- Premarital and Postmarital Agreements
- Income Tax Advice
- Tax-Exempt Organizations and Charitable Planning
- Business Planning
- Business Succession Planning
- Formation of Tax-Exempt Organizations
- Charitable Trust Planning
- Charitable Planning
- Domestic Planning

Education

- Georgetown University Law Center, J.D., cum laude, 1982
- The Wharton School of the University of Pennsylvania, B.S. in Economics, 1979