Melodie M. Menzer

Shareholder

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Overview

Melodie "Dee" is a Shareholder in the firm's Business Transactions and Private Client Services Practice Groups. She consults on the pros and cons of various tax classification elections available at the time of business formations, as well as the tax structuring of business reorganizations. She also advises on tax structuring and consequences of M&A transactions. Her practice includes a variety of business tax issues, including special allocations and complex distribution waterfalls contained in operating agreements, gain exclusion and deferral mechanisms, sales and use tax, and the tax treatment of various non-qualified deferred compensation plans. In addition, Dee provides estate planning advice to clients with business interests, consults on litigation matters concerning tax questions and implications, and prepares various business agreements.

Honors and Distinctions

- *The Best Lawyers in America*
  - Tax Law, 2027
  - *Ones to Watch*, 2022-2025
- *Florida Super Lawyers*, Rising Star, Tax, 2022-2023
- *Tampa Magazine's Top Lawyers List*, 2021, 2023-2026
- St. Petersburg Bar Foundation Heroes Among Us Award, 2026
- David Gergen Award for Leadership and Professionalism
- North Carolina State Bar Pro Bono Service Award

Professional Involvement

- Community Law Program
  - Board of Trustees, 2023-current
  - President, 2025-current
  - Vice President, 2024-2025
- St. Petersburg Bar Foundation
  - Board of Trustees, 2018-2023
  - President, 2021-2022
  - President Elect, 2020-2021
  - Board Treasurer 2019-2020
- The Florida Bar
  - Tax Section
- North Carolina Bar

Community Involvement

- Leadership St. Pete, Class of 2017
- Leadership St. Pete, Planning Committee 2020
- Cetera, Inc., Co-Founder and Board Chair
- Guardian Ad Litem, advocate for youth in foster care

Alternate Contact

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Practice Areas

- Business Transactions
- Corporate Mergers and Acquisitions
- Tax
- Private Equity and Venture Capital
- Trenam Tech

Education

- LL.M., Taxation, University of Florida Levin College of Law, 2014
- J.D., Elon University School of Law, 2013
- B.S., University of Miami, 2007

Admissions

- Florida
- North Carolina

Thought Leadership

- "For Tax Attorneys, the Forum is 'Like Gold': Melodie Menzer on the Value of the Forum for Her Practice," *Tax Forum*, Q&A, March 2026
- "FinCEN Provides Beneficial Ownership Information Reporting Relief to Victims of Hurricane Helene and Hurricane Milton," Co-Author, Trenam News, November 2024
- "Beneficial Ownership Information Reporting Requirements Go in Effect January 1, 2024," Co-Author, Trenam News, December 2023
- "U.S. Treasury's Financial Crimes Enforcement Network, FinCEN, Issues the Rule to Implement the Corporate Transparency Act (CTA)," Co-Author, Trenam News, October 2022
- "Tax Considerations in a Virtual Currency World" Presenter, Tax Council of Tampa Bay, Rotary Club, March 2021
- Tampa Bay Innovation Center Tech Accelerator Program, Presenter, December 2019, August 2020, March 2021, September 2021
- "Miscellaneous Business Tax Provisions in the CARES Act," Co-Author, Trenam News, April 2020
- "Payroll Tax Credits under COVID-19 Relief Programs," Co-Author, Trenam News, April 2020
- "Taxes and COVID-19," Co-Author, Trenam News, March 2020
- "DOL Issues First Guidance on the Families First Coronavirus Response Act," Co-Author, Trenam News, March 2020