

J. Eric “Tate” Taylor Shareholder

Tampa

101 E. Kennedy Boulevard
Suite 2700
Tampa FL 33602

Direct Line: (813) 227-7420
Fax: (813) 227-0420
Email: ttaylor@trenam.com

Overview

Tate Taylor joined Trenam in 1991. He is the leader of the firm's Private Client Services Practice Group, and is Chair of the Firm's Executive Board. He also serves on the board of directors of Raymond James Trust, N.A. His practice includes tax, estate and wealth transfer planning, closely-held business planning, estate and trust administration, probate and trust litigation and tax controversies.

Representative Matters

- Tax, estate and wealth transfer planning for high net worth individuals and closely-held business owners
- Preparation of wills, trusts and other sophisticated estate planning documents
- Tax and legal advice to private companies and their owners
- Tax and legal advice to individual and corporate fiduciaries in estate and trust administration and probate and trust litigation matters
- Tax controversies with the Internal Revenue Service
- Charitable planning for individuals and non-profit organizations, including private foundations and public charities

Honors and Distinctions

- Board Certified in Tax Law, Florida Bar
- AV Preeminent Peer Review Rated by Martindale-Hubbell
- *The Best Lawyers in America* (Trusts & Estates) 2009-2021
- *Florida Super Lawyers*, 2006-2020 (10+ year recognition)
 - Top 100: Florida Super Lawyers, 2018
 - Top 50: Tampa Bay Super Lawyers, 2018
- *Florida Trend* Legal Elite, 2012, 2019
- *Tampa Magazine's* Top Lawyers List, 2020

Professional Involvement

- The American Bar Association, Tax Section
- The American Bar Association, Real Property, Trust and Estate Law Section
- The Florida Bar, Tax Section
 - Former Executive Council Member
- The Florida Bar, Real Property, Probate and Trust Law Section
 - Former Executive Council Member
- Tampa Bay Estate Planning Council



Alternate Contact

Amy Jo Wessling
Secretary
(813) 202-7813
awessling@trenam.com

Practice Areas

Private Client Services
Estate and Trust Planning
Business Transactions
Tax
Financial Services
Nonprofit Organizations

Education

J.D., with honors, University of
Florida Levin College of Law,
1990

B.S., University of Florida, 1987

Admissions

Florida

- Former Member of Board of Directors

Community Involvement

- Tampa General Hospital Foundation
 - Board of Directors, Executive Committee, Secretary
- Holy Trinity Presbyterian Church, Tampa, Florida

Thought Leadership

- "[Money Moves](#)," Retire Ahead Newsletter Q&A Interview, May 2020
- "Swords to Plowshares: Managing Senior Partner Transitions in the Firm," Moderator, 27th Annual Marketing Partner Forum, January 2020
- "[ALERT: The Florida Revised Limited Liability Company Act Action may be required by Florida LLCs by December 31, 2014](#)," Trenam Kemker Legal Update, September 2014
- "[IRS Releases New Form 1023-EZ for Smaller Charities Applying for Tax-Exempt Status](#)," Trenam Kemker *Legal Update*, September 2014
- *Florida Limited Liability Company Forms and Practice Manual*, 2003-2014 Supplements, Data Trace Publishing Company, 2003-2014
- "Overview of Wealth Transfer Taxes" chapter of *Basic Estate Planning in Florida*, 4th, 5th, 6th and 7th Editions, The Florida Bar, 2003, 2006, 2009 and 2012
- "Tax Considerations" chapter of *Administration of Trusts in Florida*, 4th, 5th, 6th, 7th and 8th Editions, The Florida Bar, 2005, 2007, 2009, 2012 and 2014
- "Tax Considerations of Not For Profit Corporations" chapter of *Florida Corporate Practice*, 6th and 7th Editions, The Florida Bar, 2011 and 2013
- "Dissolution," "Foreign Corporations," "Tax Considerations" and "Due Process and Standing Considerations" chapters of *Not For Profit Corporations in Florida*, 4th and 5th Editions, The Florida Bar, 2002 and 2007