Alicia L. Taylor

Partner

A seventh generation Floridian, fifth generation cattle rancher, and third generation citrus grower, Ms. Taylor's distinctive heritage gives rise to her unique ability to comprehend, respect and plan for your family's legacy. She recognizes that some assets – be it a business, a lake house, a farm – have value well beyond the balance sheet as they represent family history.

As an attorney in the Estate, Trust & Wealth Preservation group, Ms. Taylor practices in the areas of estate, tax, and business succession planning, and estate and trust administration. She places an emphasis on understanding her clients' specific family circumstances to assist in identifying, prioritizing, and achieving their long term estate planning goals. Ms. Taylor holds a master's degree in taxation, combining knowledge of the tax code's intricate laws and professional understanding of wealth transfer techniques with her personal experiences with closely held business entities to craft estate plans tailored to satisfy client objectives and promote multi-generational asset transfers with minimal tax consequences.

Ms. Taylor strives to become her clients' trusted advisor and relishes the opportunity to instill confidence and exceed expectations while guiding clients through the complexities of estate planning from creation to implementation to administration.

Ms. Taylor's recent experience includes:

- Implementation of gift, estate and generation-skipping transfer tax techniques to achieve tax efficiencies and shift assets to preferred beneficiaries via drafting wills, revocable trusts, qualified personal residence trusts, grantor retained annuity trusts gifting trusts, irrevocable life insurance trusts, and spousal access trusts;
- Creation, funding, and administration of charitable vehicles including family foundations, donor advised funds, and charitable trusts;
- Preparation of federal gift, generation-skipping transfer, and estate tax returns;
- Preparation of prenuptial and antenuptial agreements;
- Administration of estates and trusts; and
- Formation and transfer of closely held business entities.

Legal Services

- Estate, Trust & Wealth Preservation

Education and Honors

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- University of Florida Levin College of Law (LL.M., 2012)
  - Major: Taxation
  - Research Assistant for Professor Dennis A. Calfee
  - Member of Florida Blue Key
- University of Florida Levin College of Law (J.D., *magna cum laude*, 2011)
  - Order of the Coif
  - Certificate in Estates & Trusts
  - *Journal of Law and Public Policy* (Managing Editor)
  - Book Award Recipient in Taxation of Gratuitous Transfers, Estate Planning, Estates & Trusts, and Insurance Law
- University of Florida (B.S., *cum laude*, 2008)
  - Major: Food and Resource Economics

Bar Admissions

- Florida

Professional and Civic Activities

- The Florida Bar, member of Real Property, Probate and Trust Law Section; member of Tax Section
- Collier County Bar Association, member
- Girls on the Run of Collier County, board of directors, 2013-2020
- Alumni Association of the Wedgworth Leadership Institute, board of directors, 2019-present
- Wedgworth Leadership Institute for Agriculture and Natural Resources, member, Class X
- Florida Fellows Institute of the American College of Trust and Estate Counsel, member, Class II

Professional Recognition

- "40 Under 40" by *Gulfshore Business,* 2021
- Growing Associates in Naples (GAIN) Class of 2014
- *The Best Lawyers in America*® "Ones to Watch," Trusts and Estates, 2021, 2022
- Florida Super Lawyers® - Rising Stars, Estate & Probate, 2022