

## T. Robert Bulloch

### Partner

Rob Bulloch is an intimately trusted advisor to some of Florida's most affluent individuals and families, ably handling the complexities of wealth management and generational transfer with the greatest of personalized care. Virtually his entire practice comes from the referrals of his current clients, which is to say that he works for people with the deep confidence and faith required to entrust him with their families' futures, with wishes that extend decades beyond their lifetimes, and with hundreds of millions of dollars of their wealth. He is a fixer, a planner, a legacy-maker, whose responsibilities extend beyond the comprehensive management of finances and estates to the needs and well-being of every family member, on behalf of each client at the direction of the senior generation. His client list is elite, even exclusive, because his commitment to excellence requires him to give all of his time and attention to those he serves, rather than what he can spare to as many people as possible.

Rob's central focus lies in wealth transfer-shifting techniques, building plans for and then transferring assets down through generations, fully defined during his clients' lives so they can see and realize the benefits and can guard against the drawbacks of wealth transfer to new generations. He tends to their financial needs with estate planning, closely held business planning matters and—if required—probate or fiduciary litigation to protect his clients' intent, but he serves the fuller interests of his clients simply by remaining the confidant they can count on for their lifetimes and beyond.

Discretion, communication, and accessibility are cornerstones of Rob's relationships. His insight into and involvement in his clients' lives are so sensitive by nature, and so essential in execution, that he becomes something akin to the general counsel or COO of the family's legal and wealth preservation operations, taking responsibility for some of its most critical affairs. Rob comes by his appreciation and capacity for his work as a fourth-generation estate planner, who shares in each client's successes and failures, joys and heartaches, as one who was born to do it. He demands of himself his absolute best on behalf of the individuals and families he serves.

### Legal Services

- [Estate, Trust & Wealth Preservation](#)
- [Fiduciary, Trust and Probate Litigation](#)

### Education and Honors

- Northwestern University, Kellogg School of Management, Certificate, Quarles & Brady Leadership Program (2016)
- University of Florida Levin College of Law (J.D., 2002)



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### Naples Office

Tel: (239) 434-4927

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- University of Florida (B.A., *with honors*, 1999)

### **Bar Admissions**

- Florida

### **Professional and Civic Activities**

- Humane Society Naples (Immediate Past President; Member of Board of Directors)
- Community Foundation of Collier County (Past Treasurer; Past Trustee; Current Trustee Emeritus)
- State Bar of Florida (Member: Real Property, Probate and Trust Section)
- Collier County Bar Association (Member)

### **Professional Recognition**

- Listed in *The Best Lawyers in America*<sup>®</sup> (2019-present: Trusts & Estates)
- Martindale-Hubbell AV<sup>®</sup> Preeminent<sup>™</sup> Peer Review Rated
- Selected to *Naples Illustrated's* "Top Lawyers" (2019, 2020: Trusts and Estates)
- Selected for inclusion in the Florida Super Lawyers (2018-present: Estate Planning & Probate)
- Selected for inclusion in the Florida Super Lawyers–Rising Stars (2009-2017: Estate Planning & Probate)
- *Gulfshore Business* "40 Under 40" (2010)
- Florida Trend Magazine "Up & Comer" (Estate Planning; 2008)