



Adam C. Kerlek

Of Counsel

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Profile

Adam is a Florida Bar Board Certified Wills, Trusts and Estates Lawyer, with experience in complex estate planning and wealth preservation, probate and trust administration, and business planning for closely held businesses and charitable non-profit organizations.

Adam works with the firm to develop long-term strategies for clients to minimize taxes, preserve and protect assets, and achieve philanthropic goals. He has counseled clients in prudently transferring hundreds of millions of dollars of wealth to new generations.

Representative Matters

Multi-generational family trusts creation and laws

- Serves as primary legal counsel for a trustee managing \$1.5 billion dollars in 180 trusts for the benefit of over 60 family members across 3 generations (ages 1 to 80).
- Created hundreds of multi-generational family trusts, some with assets in excess of \$50 million dollars.

Florida tax and federal tax law

- Counsels clients, consisting of successful business owners and professional athletes and coaches, in reducing or eliminating federal taxes (including estate, gift, and generation-skipping taxes).
- Assists clients in structuring their assets and establishing trusts in order to reduce or eliminate federal income taxes.
- Advised numerous charitable organizations in eliminating payment of Florida sales tax.

Dynasty Trust creation and law(s):

- Assists clients in strategically applying their family members' generation-skipping transfer (GST) tax exemptions to trusts that have been existence for over 4 decades.
- Structured family limited partnerships that are held by Dynasty Trusts in order to provide asset protection and reduce or eliminate transfer taxes.

Fiduciary law

Education

- University of Miami School of Law (J.D., *cum laude*, 2008)
- Ohio State University (B.S. in Engineering, *magna cum laude*, 2005)

Bar/Court Admissions

- Florida
- U.S. District Court for the Middle District of Florida

Practices

- Startup and Emerging Business
- Exempt Organizations
- Trust and Estate

- Served as executor and trustee for clients who have passed away, administering their estates for the benefit of their children. Adam strictly complies with all fiduciary law obligations.
- Counseled trustees and executors in handling unique assets, including operating businesses. Specifically, Adam advised a manager of a business entity owning valuable music royalties of the fiduciary obligations under corporate law, and under trust law.

Honors & Affiliations

- Listed in:
 - *The Best Lawyers in America*®, Trust and Estates, 2019-2022
 - *Florida Super Lawyers*® Florida Rising Star - Estate & Probate, 2017-2021
 - *Naples Illustrated Top Lawyers* 2018, Trust and Estates
 - *Martindale-Hubbell*®, AV Preeminent Rated
- Florida Bar Board Certified Wills, Trusts and Estates Lawyer
- American Bar Association, Real Property, Trust and Estate Law Section
- Florida Bar Association, Real Property, Probate and Trust Law Section
- Collier County Bar Association, Vice-Chair, Trusts and Estates Section
- 2019 Graduate of the Florida Fellows Institute of the American College of Trust and Estate Counsel (ACTEC)
- Articles & Comments Editor, *University of Miami International Law Review*
- Moot Court Board, Semi-Finalist in National Duberstein Moot Court Competition
- *Gulfshore Business*, Forty under 40 Honoree, 2015

Representative Presentations

- Retirement Planning under the SECURE Act, Community Foundation of Collier County, August 2019
- Domicile and Relocating to Florida, 2009, 2014, 2015, 2016
- Planned Giving in Real Life: a Donor Centered Approach, Panelist, Greater Naples Area Planned Giving Council's Annual Symposium, 2016
- Elder Financial Exploitation: an Introduction for Financial and Legal Professionals, 2014
- Florida's New Durable Power of Attorney Law, 2011, 2012
- Estate Tax Deferral and Borrowing to Pay the Estate Tax, 2010

Representative Publications

- "Blended Families: Estate Planning for ex-spouses, new spouses, children, and stepchildren," *Naples Daily News*, March 2013
- "Common Mistakes of Individual Trustees," *Naples Daily News*, March 2012
- "Co-Author, Consider Terminating your Charitable Remainder Trust Early," *Florida Weekly*, April 2010

Other Activities

- President, Greater Naples Area Planned Giving Council, Inc.
- Past Director and Treasurer, Brody Project for Animal Assisted Therapy, Inc.
- Member, Community Foundation of Collier County, Professional Advisors Council
- Member, Estate Planning Council of Naples
- Member, Ohio State Alumni Club of Naples
- United Way of Collier County, Annual Budget Review Committee