



T. John Costello, Jr.

John is a member of the firm's Corporate Department. His practice focuses on estate planning, probate and trust administration, probate litigation, guardianships and general business law.

Prior to pursuing the practice of law, John worked as a software engineer for a defense contractor and received a Certificate in Systems Engineering from the California Institute of Technology's Industrial Relations Center. While at Emory University School of Law, he participated in the Technological Innovation: Generating Economic Results (TI:GER) Program and graduated with honors.

Representative Experience

Estate Planning

- Drafting of wills, trusts, powers of attorney, healthcare documents, and beneficiary designations
- Drafting and negotiation of prenuptial agreements
- Administration of trusts and estates
- Representation of fiduciaries and beneficiaries during the administration of trusts and estates
- Negotiation and drafting of settlement agreements and trust modification agreements
- Representation of surviving spouses in elective share disputes

Guardianship

- Representation of professional and non-professional guardians
- Serving as court appointed counsel for alleged incapacitated persons and wards
- Experience with contested guardianship, including those involving undue influence, exploitation, and multi-jurisdictional issues

Corporate Governance

- Drafting of company minutes, shareholder agreements, and operating agreements for closely held businesses
- Acting as general corporate counsel for closely held businesses and assistance with contract review, litigation support, and various employment issues

Senior Associate

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EDUCATION

Emory University School of Law, J.D.,
honors, 2009

Florida State University, B.S., 2002

SERVICES

Tax, Estate Planning & Personal Wealth

- Estate and gift planning
- Marital agreements, adoptions and guardianships
- Probate, trust and guardianship litigation
- Wealth and asset preservation
- Family office

Business Growth & Operation

- Corporate governance
- Family office

Litigation

- Probate, trust and guardianship litigation
- Unmanned and autonomous systems (Drones and driverless vehicles)

Mergers & Acquisitions

- Family office

Bar Admissions

Florida

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

Presentations

- “Real (Property) Problems with Probate,” Collier County Bar Association, Oct. 11, 2019
- “Homestead Expenses During Probate Administration,” Lee County Bar Association Real Property Probate & Trust Law Section, April 12, 2019
- “2016 Legislative Update,” Collier County Bar Association Trusts and Estates Section, June 16, 2016
- “Ethics and Security When Using the Cloud in Your Estate Planning Practice,” Estate Planning Council of Lee County, November 2014
- “Demystifying Planned Giving,” Partnership for Philanthropic Planning of Lee County, May 2014
- “Charitable Giving & Trust Planning with Retirement Benefits,” Financial Planning Association of Southwest Florida, June 2013

Publications

- “Avoiding tangible personal property disputes,” *Naples Daily News*, March 3, 2019
- “Probate case summaries,” *ActionLine*, June 15, 2016
- “Probate case summaries,” *ActionLine*, Jan. 15, 2016
- “Ensuring your inherited IRA gift will be well received,” *Lifestyle Estero*, November 2012
- “Coalition puts tax strategy patents in its cross hairs,” *Investment News*, December 2010

Honors | Awards

- *Real Property, Probate and Trust Law Section of the Florida Bar*, Fellowship, 2014 - 2016
- *Lee County Bar Association*, Pro Bono Award, 2014

PROFESSIONAL ASSOCIATIONS

- Real Property, Probate & Trust Law Section of the Florida Bar, *Guardianship & Power of Attorney Committee*
- Estate Planning Council of Naples
- Estate Planning Council of Lee County
- Collier County Bar Association, *Trusts and Estates Section*