



Michael A. Sneeringer

partner

Michael practices estate planning, estate administration and wealth preservation within the firm's Corporate Department. His major areas of focus are estate planning, estate administration, asset protection and tax law.

Michael regularly publishes and presents on key issues around trust and estate planning. He is the Trust & Estate articles editor for *Probate & Property Magazine* and reports annually from the Philip E. Heckerling Institute on Estate Planning for the American Bar Association Section of Real Property, Trust and Estate Law.

REPRESENTATIVE MATTERS

Estate Planning

- Creation of wills and trusts for individuals, as well as drafting of healthcare documents and powers of attorney
- Preparation and review of estate and gift tax returns

Wealth Preservation

- Assist business owners, professionals, entrepreneurs, and their families in implementing asset protection structures
- Perform risk management overview for Florida, Ohio and Wisconsin residents

Estate Administration

- Assist personal representatives, executors and beneficiaries with estate administration in Florida, Ohio and Wisconsin
- Assist with simplified probate proceedings, such as summary administration in Florida

Real Estate

- Review trusts being used for loan transactions
- Due diligence on potential transactions

CONTACT

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EDUCATION

University of Miami School of Law,
LL.M., 2014

St. Thomas University School of
Law, J.D., *cum laude*, 2011

Washington & Jefferson College,
B.A., 2008

SERVICES

Tax, Estate Planning & Personal Wealth

- Wealth and asset preservation
- Estate and gift planning
- Probate, trust and guardianship litigation
- Family office

Litigation

- Probate, trust and guardianship litigation

Sports

Business Growth & Operation

- Family office

Bankruptcy, Workout & Creditors' Rights

- Assist in litigation matters where a trust holds title to the debtor's principal assets (or the debtor is a beneficiary of a trust)
- Review trusts for creditor and trustee institutional clients
- Review structures to determine collectability

Intellectual Property

- Review transactions where estates and trusts are involved in sale of copyrights or royalties

Business Competition, Advice & Litigation

- Draft company minutes, consents and operating agreements for closely held businesses
- Formation of closely held business entities
- Restructuring of closely held business entities
- Review of closely held business for purposes of litigation support
- Assist with business succession planning

BAR ADMISSIONS

- Florida
- Ohio
- Wisconsin

PRESENTATIONS

- "Reverse Mortgages: Good v. Evil?" The Florida Bar Real Property, Probate and Trust Law Committee Audio Webcast, Jan. 27, 2020
- "All I Got Was a Watch: Tips and Techniques for Disposing of the Family Business and Continuing Family Harmony," South Dakota Trust Association 4th Annual Fall Forum, Oct. 8, 2020
- "Mom Liked Me Better and She Will Prove It: Pre-Mortem Validation – Permanent Solution or Fad", ABA/RPTE Spring Conference Webinar, May 15, 2020
- "Drafting Gun Trusts 101," Federal Bar Association Live CLE Webinar, March 9, 2020
- "2020 Heckerling Update," Lee County Bar Association Real Property, Probate and Trust Law Section, Feb. 14, 2020
- "Heckerling Update," Estate Planning Council of Lee County, Feb. 13, 2020
- "Gun Trusts: What's All the Fuss?" Coral Gables-South Dade Estate Planning Council, Nov. 19, 2019
- "Advanced Gun Trusts," ProLawCLE, Sept. 19, 2019
- "Estate Planning for Real Estate in Living Trusts," Webcredenza, Sept. 12, 2019
- "Trust and Estate Planning for Cabins, Boats, Vacation Homes & Assets," Webcredenza, Aug. 27, 2019
- "Basics of Asset Protection," CCMS & NCH Healthcare System Resident Series, Aug. 22, 2019
- "Advanced Gun Trusts," LawPracticeCLE, July 19, 2019
- "Trust and Estate Planning for Real Estate, Part 1 and 2," Webcredenza, June 25 and 26, 2019
- "2019 Trust and Estate Planning Update," Webcredenza, May 14, 2019
- "Gun Trusts: The Complete Guide," LawPracticeCLE, April 25, 2019

- “Uniform Voidable Transactions Act: Sword or Shield (It Depends on Who You Are Talking To...),” Estate Planning Council of Lee County, April 18, 2019
- “Trust and Estate Planning for Second Marriages,” Webcredenza, March 20, 2019
- “Construction Law Forum,” Porter Wright, March 20, 2019
- “Trust and Estate Planning for Single Clients,” Webcredenza, Feb. 13, 2019
- “Trust and Estate Planning for Divorce,” Webcredenza, Jan. 17, 2019
- “Use of Out of State & International Entities & Trusts for Florida Residents,” Lee County Bar Association Real Property, Probate and Trust Law Section, Nov. 9. 2018
- “Use of Out of State & International Entities & Trusts for Florida Residents,” Bonita/Estero Estate Planning Group, Nov. 8. 2018
- “Family Feuds in Trusts: How to Anticipate & Avoid,” Webcredenza, March 7, 2018
- “Discretionary Trusts: Risks, Opportunities & Best Uses,” Webcredenza, March 2, 2018
- “Choosing the Right Trust, Part 1 and 2,” Webcredenza, Jan. 30 and 31, 2018
- “Estate Planning for the Elderly, Part 1 and 2,” Webcredenza, Dec. 14 and 15, 2017
- “An In Depth Look at Current Strategies in Asset Protection & Tax Planning for the Modern Estate Plan,” The Florida Bar Real Property, Probate & Trust Law Section, Nov. 30, 2017
- “Planning for the Freeze: Trust & Estate Planning to ‘Freeze’ Asset Values,” Webcredenza, Nov. 21, 2017
- Informa Financial Intelligence Lunch & Learn, Trust Users Group National Education Conference, Oct. 17, 2017
- “Estate Planning for Second Marriages,” Webcredenza, Oct. 10, 2017
- “Recent Developments in Estate Planning,” South Dakota Trust Association, Aug. 30, 2017
- “Planning with GRATs,” Webcredenza, Aug. 1, 2017
- “Hotter Topics in Trust and Estate Planning,” Estate Planning In Depth, American Law Institute – Continuing Legal Education, June 26, 2017
- “Funding Trusts: Asset Planning and Financial Distributions,” Webcredenza, May 2, 2017
- “Hot Topics in Estate Planning,” Estate Planning in Depth 2016, June 28, 2016
- “There’s No Place Like Home – Domestic Self-Settled Asset Protection Trusts and Inter Vivos QTIP Trusts: Why Do Them and Where To Go When You Do,” American Bar Association, Dec. 9, 2014
- “Current Estate Planning/Asset Protection Tricks and Treats,” North Dade/South Broward Estate Planning Council, Nov. 19, 2014

PUBLICATIONS

- “Estate planning lessons from Mookie Betts and Fernando Tatis, Jr.,” *Wealth Management Magazine*, April 21, 2021
- “Mom liked me better, and she will prove it: Pre-mortem validation—permanent solution or fad?” *Probate and Property Magazine*, March/April 2021
- “Exemptions and waivers: Kearney Construction – A whole new ball game,” *Actionline*, Fall 2020
- “Of waivers and exemptions: protecting exempt assets in Florida following the Kearney Construction case,” *Steve Leimberg’s Asset Protection Planning Newsletter*, Feb. 27, 2020
- “The role of the physician in Florida’s new human trafficking laws,” *The Forum Magazine*, November/December 2019

- “Recent Florida case revisits Berlinger Decision,” *Real Property Probate & Trust Law Newsletter*, Lee County Bar Association, Summer 2019
- “Second DCA keeps Berlinger alive another day,” *Steve Leimberg’s Estate Planning Newsletter*, May 30, 2019
- “The case for trusts as an alternative to prenuptial agreements when religion intervenes,” *Probate & Property*, May/June 2019
- “Fiduciary law trends: A roundup of significant court cases,” *Trust & Estates*, May 2019
- “Avoiding tangible personal property disputes,” *Naples Daily News*, March 3, 2019
- “Only one can win? Property tax exemptions based on residency under Florida law,” *The Florida Bar Journal*, September/October 2018
- “Did the Supreme Court’s Legg denial just kick the can down the road?” *Tax Management Estates, Gifts and Trusts Journal*, Bloomberg BNA, Nov. 9, 2017
- “Overview of timely topics in trust and estate planning,” *Estate Planning Journal*, October 2017
- “A duty? Relax, recent decanting case does not give trustees an affirmative duty to decant,” *Estate Planning Newsletter #2561*, Leimberg Information Services, Inc., June 22, 2017
- “Fiduciary law trends,” *Trust & Estates*, May 2017
- “Gun trusts – What’s all the fuss?” *Probate & Property Magazine*, March / April 2017
- “Trusts,” *Lexis Practice Advisor -- Florida Business & Commercial Module*, December 2016
- “The tools & techniques of trust planning, 1st edition,” *The National Underwriting Company*, December 2016
- “Disability planning,” *Lexis Practice Advisor -- Florida Business & Commercial Module*, Oct. 28, 2016
- “Wills,” *Lexis Practice Advisor -- Florida Business & Commercial Module*, June 16, 2016
- “Fiduciary law trends,” *Trust & Estates*, May 2016
- “Creditors’ rights to social security benefits in Florida,” *State-to-State, The Florida Bar Out-of-State Division*, Winter 2015
- “Planning for second spouses and first marriage children and (surprisingly) making everyone happy!” *Actionline*, Summer 2015
- “Drafting attorneys and litigation attorneys need to collaborate,” *eReport*, American Bar Association, Real Property, Trust and Estate Law Section, August 2014
- “Asset protection planning without malpractice risk,” *Daily Business Review*, Feb. 18, 2014
- “Estate planning: Trusts and estates attorneys are more than just trust and estate drafters,” *eReport*, American Bar Association, Real Property, Trust and Estate Law Section, August 2013

PROFESSIONAL ASSOCIATIONS

- American Bar Association, Section of Real Property, Trust and Estate Law
 - *Probate & Property Magazine*, Articles Editor, Trust & Estate
 - Non-Tax Estate Planning Considerations Group, Chair
 - Generation Skipping Transfers Committee, Co-Chair
- Collier County Bar Association, Trusts and Estates Section, Past Chair
- The Florida Bar
 - Real Property, Probate and Trust Law Section
 - Fellowship, 2014-2016
 - Executive Council Member
 - At-Large Member

- Asset Protection Committee, Co-Vice-Chair
- Information Technology Committee, Co-Vice-Chair
- Estate & Trust Tax Planning Committee, Member
- Law School Mentoring and Programming Committee, Member
- Florida Probate Rules Committee, Member

HONORS | AWARDS

- *Best Lawyers: Ones To Watch*, Trusts and Estates, 2021
- *Florida Super Lawyers*®, Rising Stars Edition, Estate & Probate, 2019-2020
- *Naples Illustrated*, Top Lawyers, Trusts and Estates
- Florida Fellows Institute of the American College of Trust and Estate Counsel (ACTEC), Graduate (Class II), May 2017
- Florida Bar Real Property, Probate and Trust Law Section, At-Large Member of the Year Award, 2017

COMMUNITY

- Collier County Bar Foundation, Board of Directors
- Florida Lawyers Assistance, Inc., Board of Directors