

## E. Jackson Boggs

E. Jackson Boggs has extensive experience in federal income, estate and gift taxation, corporations, estate planning, estate and trust administration, pension and profit sharing plans.

### Presentations and Publications

#### Presentations

- "Law in Federal Income Taxation," Lecturer, (Faculty Member one year), Stetson University College of Law
- "Business Law," Lecturer, (Faculty Member two years), University of South Florida
- Tulane Tax Institute, West Virginia Tax Institute
- Annual Florida Trust Officers Conference
- Estate Planning Council of Jacksonville
- Estate Planning Council of Tampa
- Estate Planning Council of Lakeland-Bartow
- Institutes given at meetings of The Florida Bar, Chartered Life Underwriters, St. Petersburg Accountants Assoc., Merrill Lynch and Reynolds & Co., Brokerage

#### Publications

- "The Sword was Turned upon the Commissioner," Author, *The Journal of the Florida Medical Association*, 59, January 1969
- "The Specter of Gifts in Contemplation of Death," Author, *Nineteenth Annual Tulane Tax Institute*, 409, 1970
- "Pooled Income Funds May Now Be the Best Method of Charitable Trust Giving," Author, *Journal of Taxation*, 162 September, 1971
- "Many Post-Death Decisions Can Greatly Reduce Estate and Income Taxes," Author, *Taxation for Lawyers*, 1979
- "Estate Planners and Family Law Practitioners: Beware of REA Rules Re Retirement Plan Distributions," Author, *Florida Bar Journal* July 1985
- "New Florida Statute Protects Retirement Plan Assets from Claims of Creditors," Author, *The Florida Bar Journal*, November 1987
- "Forming and Funding a Family Limited Partnership," The Birth and Life After Death of the Family Limited Partnership, The Florida Bar Tax Section, April 27, 2001

#### Professional Affiliations

- American Bar Association: Taxation Section, Former Chairman, Estate and Gift Tax Deductions Subcommittee
- The Florida Bar: Chairman, Tax Section, 1973-1974; Executive Counsel, Tax Section
- The Florida Bar Foundation
- Hillsborough County Bar Association: Treasurer and Member of Board of Directors, 1968-1970
- Tampa Bay Estate Planning Council
- The West Virginia Tax Institute, Inc.: Secretary and Board of Trustees, 1959-1960



#### Chairman Emeritus of the Firm

Tampa

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#### Practice Areas

Corporate and Business Services  
Estate and Gift Tax  
Estate Planning, Estate Settlement and Trust Administration  
Federal Tax  
Taxation  
Wealth Preservation, Trusts and Estates

#### Education

LL.B., University of Virginia School of Law, 1957 (Phi Delta Phi)  
B.A., University of Virginia, 1952 (Alpha Kappa Psi; Sigma Phi Epsilon)

#### Bar Admissions

Florida  
Virginia  
West Virginia

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### Community Involvement

- **Current Community Involvement**
- Canterbury Towers: Chairman of the Board; President, Board of Trustees
- Endowment Fund of St. John's Episcopal Church and St. John's Episcopal Day School: Board of Trustees
- Rotary Club of Tampa
- Tampa Bay Estate Planning Council
- **Former Community Involvement**
- Community Foundation of Tampa Bay Inc.: Board of Directors
- Sertoma Club of Tampa: Former Member
- Tampa General Hospital Foundation: Board of Trustees
- University of Tampa: Former Member, Board of Directors
- Victory Ship: Board of Directors
- Women's Hospital: Board of Trustees

### Distinctions

**AV Peer Review Rated**, by Martindale-Hubbell

**The Best Lawyers in America**, 1991-2010

**Board Certified** in Tax Law, The Florida Bar

**Chambers USA**, 2004-2009; listed as a leading Tax lawyer in Florida

**Florida Legal Elite**, *Florida Trend Magazine*, 2004, 2005, 2008, 2009; ranked in the top 2% of practicing Florida Bar Members

**Florida Super Lawyers**, 2006-2009

**Outstanding Tax Attorney of the Year**, Awarded by the Tax Section of The Florida Bar; 1992-1993