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Robert H. Waltuch

Shareholder
Wealth Preservation, Trusts and Estates Practice Group Leader
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Robert H. Waltuch practices in the area of estate planning administration, trust and estate, fiduciary duties, including compliance with the Prudent Investor Rule and the new Florida Principal and Income Act, post mortem estate planning, complex value shifting techniques (including GRATS, QPRTS, installment sales to intentionally defective income trusts fractionalizing real estate), generation-skipping techniques, family limited partnerships, insurance planning, marital gift planning, pre and post-nuptial agreement, and business succession planning.

Representative Experience

- Holland & Knight LLP, Tampa, FL
  Partner, 1985-2002
- Internal Revenue Service
  Chief of the Estate and Gift Tax Branch of Legislative and Regulations Division, Office of Chief Counsel, 1977-1985

Presentations and Publications

- "Planning for the Highly Compensated," Co-Author, Chapter 2, *Estate and Financial Planning*, published by Callaghan and Company
- "Testamentary Transfers to a Surviving Spouse," Co-Author, Chapter 21, *Estate and Financial Planning,* published by Callaghan and Company
- "Life Insurance Planning," Co-Author, Chapter 22, *Estate and Financial Planning*, published by Callaghan and Company
- "Disclaimers," in *Estate and Financial Planning*, Co-Author, Chapter 37, published by Callaghan and Company

Professional Affiliations

- American Bar Association: Member, Taxation Section
- The Florida Bar: Chairman, Estate and Gift Tax Committee, 2001-2002; Member, Real Property, Probate and Trust Law Section

Community Involvement

- Metropolitan Ministries: Former Member, Board of Directors
- Weinberg Village: Board of Directors

Distinctions

AV Peer Review Rated by Martindale-Hubbell

The Best Lawyers in America, 2005-2009

Florida Super Lawyers, 2007-2008

Practice Areas

Estate and Gift Tax
Estate Planning, Estate Settlement and Trust Administration
Trust, Estate, and Probate Litigation
Wealth Preservation, Trusts and Estates

Industries

Banking and Financial Services

Education

J.D., Western New England College, 1980
M.L.T, Georgetown University, 1980
B.A., Franklin & Marshall College, 1969

Bar Admissions

Florida
Connecticut