ANDREW H. THOMPSON

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Andrew H. Thompson's practice focuses on estate planning, probate and trust administration, and tax matters. Drawing on nearly 15 years of experience in estate and tax planning, Andrew advises individuals and families in all aspects of traditional and sophisticated estate planning, gift and generation skipping tax planning and charitable planning matters. Specifically, Andrew routinely counsels clients on the structuring and implementation of estate plans designed to meet their planning goals and allow for the orderly and efficient transfer of wealth from one generation to the next through the use of wills, revocable trusts, irrevocable trusts, life insurance trusts and other sophisticated estate planning vehicles. Andrew also advises fiduciaries and beneficiaries in the areas of estate and trust administration, trust modifications and probate and trust litigation matters. In addition, Andrew advises individuals and non-profit organizations in charitable planning, including establishing charitable trusts, private foundations and public charities.

Andrew also frequently assists individuals and businesses with federal income tax planning as well as federal and state tax controversies and audits.

Andrew was accepted into Class V of the Florida Fellows Institute of the American College of Trust and Estate Counsel (ACTEC), co-authored the latest edition of a chapter on "The Florida Trust Code" in Administration of Trusts in Florida (Florida Bar 2018), regularly speaks on trusts and estates topics, and has been recognized as a Rising Star by Florida Super Lawyers.

Practice Areas:
Estate Planning & Probate
Business & Corporate
Tax

Education:
LL.M. in Estate Planning, University of Miami Heckerling Graduate Program
J.D. Stetson University
B.A. University of Michigan

Bar & Court Admissions:

The Florida Bar
U.S. Tax Court

Professional Organizations:

Central Florida Estate Planning Council
The Florida Bar Real Property, Probate and Trust Law Section

Asset Protection Committee
Attorney/Trust Officer Liaison Committee
Charitable Planning & Exempt Organizations Committee
Estate and Trust Tax Planning Committee

Speaking Engagements:

"CARES Act and SECURE Act," Central Florida Estate Planning Council, December 8, 2020
"Planning for Retirement Benefits After the SECURE Act," The Tri-County Estate Planning Council of the Villages, Inc., March 10, 2020
"The SECURE Act: What You and Your Clients Need to Know Now," Zimmerman Kiser Sutcliffe Executive Briefing Series, February 12, 2020
"Charitable Planning—The Power of Philanthropy," Zimmerman Kiser Sutcliffe Executive Briefing Series, February 27, 2019
"Traps in Planning with Revocable Trusts," National Business Institute Seminar, August 10, 2018
"Fixing Problem Trusts: Trust Reformation and Modification," National Business Institute Seminar, August 10, 2018
"Digital Assets," Zimmerman Kiser Sutcliffe Executive Briefing Series, May 16, 2018

Articles and Publications:

"Remote Online Notarization and Related Form Changes," Zimmerman Kiser Sutcliffe Newsletter
Administration of Trusts in Florida (Fla. Bar CLE 10th ed. 2019), Chapter 18: The Florida Trust Code (co-author with Laura K. Sundberg, Esq.)
"Tenancy-by-the-Entirety: What is it and why Does it Matter?," Zimmerman Kiser Sutcliffe Newsletter