



## **ANDREW H. THOMPSON**

Of Counsel

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Andrew H. Thompson's practice focuses on estate planning, probate and trust administration, and tax matters. Andrew advises individuals and families in all aspects of traditional and sophisticated estate planning, gift and generation skipping tax planning and charitable planning matters.

After working with a Miami-based firm that specialized in tax and estate planning and helping them expand to Orlando, Andrew joined ZKS in 2016 to supplement the trust and estate department and further his development in the practice area.

Andrew is a graduate of Class V (2022) 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.

Andrew actively participates in several committees of the Real Property, Probate and Trust Law Section of the Florida Bar and currently serves as vice-chair of the Estate and Trust Tax Planning Committee.

As an estate planning attorney, Andrew treats his clients with utmost respect and compassion as he deeply values the amount of trust they put into him to structure, implement, and administer their trusts and estates. When working with his clients, Andrew aims to get to know them personally, understand their concerns, and collaborate with his clients and their advisors to establish a plan that will reflect their core values as they leave a part of their legacy for their families.

Andrew routinely advises his clients on the structuring and implementation of estate plans designed to 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.

In addition, Andrew advises fiduciaries and beneficiaries in the areas of estate and trust administration, trust modifications, and probate and trust litigation matters.

Andrew also advises individuals and non-profit organizations in charitable planning, including charitable trusts, private foundations, and public charities.

As part of the firm's tax practice, Andrew also frequently assists individuals and businesses with federal income tax planning as well as federal and state tax controversies and audits.

Andrew enjoys practicing law at ZKS due to the team-oriented culture that has been cultivated within the attorneys, staff, and administration. He appreciates that the firm recognizes each person as more than just an employee, and genuinely wants what is best for each individual and their family.

When he is not working, Andrew spends time going to Disney World, playing guitar and piano, and cooking and baking with his wife and daughter.

### **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

The Real Property, Probate and Trust Law Section of the Florida Bar

The Central Florida Estate Planning Council

Florida Fellows Institute of the American College of Trust and Estate Counsel

### **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