

Juan D. Bendeck

Partner

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West Palm Beach, FL 33411

Practice Areas

Wealth Planning & Family Office

Family Office Services

Tax

Wealth Planning

Bar Memberships

Florida

Juan is a Board Certified Specialist in Wills, Trusts and Estates by The Florida Bar and a native of Southwest Florida. Board certification recognizes attorneys' special knowledge, skills, and proficiency in the area of wills, trusts, and estates, as well as professionalism and ethics in practice. There are fewer than 300 Board Certified Specialists in Wills, Trusts and Estates in the State of Florida. Additionally, Juan is the partner-in-charge of the Naples office.

Juan's practice focuses on estate planning, estate and trust administration, and fiduciary litigation. His estate planning practice involves innovative and leading-edge tools designed to accomplish clients' goals related to wealth transfer planning and asset protection, with an emphasis on tax efficiency. Juan takes a client-centric approach to estate planning, emphasizing clear, concise, prompt, and effective communication.

Juan has substantial experience drafting wills and living trusts and advising on complex transactions involving grantor trusts and entity-based planning, including the use of LLCs and partnerships. His experience also includes Grantor Retained Annuity Trusts, Charitable Remainder Trusts, Charitable Lead Trusts, Private Foundations, Irrevocable Trusts, gifting matters, and multi-generational planning.

Juan's estate and trust administration practice includes representing personal representatives and trustees in the

administration of estates and trusts. He guides fiduciaries through all aspects of the administration process in an effective and easy-to-understand manner. Juan has extensive experience administering complex estates and trusts and assisting fiduciaries in resolving issues that arise during the administration process. He also has substantial experience preparing federal estate tax returns, gift tax returns, and addressing generation-skipping transfer tax issues, including the successful representation of fiduciaries in estate, gift, and generation-skipping tax audits.

In addition, Juan has extensive experience representing both professional and individual fiduciaries in contested estate and trust administration matters. He has successfully represented clients in will and trust contests, breach of fiduciary duty claims, the defense of claims brought against fiduciaries, and the pursuit of claims on behalf of beneficiaries.

Juan also assists clients with matters related to relocating to and establishing permanent residence in Florida. He advises clients on establishing Florida domicile and terminating an existing domicile, counsels on potential state tax consequences following relocation, and provides guidance regarding Florida homestead laws. Juan also assists with the closing and settlement of residential purchases in Florida and the preparation and filing of Florida Declarations of Domicile and related documents.

Other Info About Juan

Education

University of Florida College of Law, J.D., High Honors, Order of the Coif

University of Florida Graduate Tax Program, LL.M. in Taxation

University of Florida, B.S. Economics, Highest Honors

Courts

U.S. Tax Court

Recognition

The Best Lawyers in America®: Tax Law, 2023-2027; Trusts and Estates, 2019-2027

Selected to the Florida Super Lawyers list for Estate Planning & Probate, Estate & Trust Litigation, 2023-2025

Professional Affiliations

Member, Tax Section, American Bar Association

Member, Tax, Estate Planning and International Sections, Florida Bar Association

Member, Collier County Bar Association

Former Member and Chairman of Finance Committee, Florida Humanities Council

Civic Activities

Trustee, Collaboratory of Southwest Florida

Chairman, Planned Giving Committees, Florida Gulf Coast University

Chairman, Planned Giving Committee, Conservancy of Southwest Florida

Member, Board of Directors, Naples Zoo

Member, Board of Directors, Goodwill Industries of Southwest Florida, Inc.

Member, Planned Giving Committee, Guadalupe Foundation

Member, Equity Diversity Action Committee and Site Selection Committee, Lee County School Board

Presentations

Moving to Florida? What High-Net-Worth Families Need to Know About Residency and Domicile (Ep. 19) – G360 Wealth Podcast

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