

Todd D. Kaplan practices in the firm's Trusts and Estates practice group, representing individuals and fiduciaries in a full range of estate planning, tax and probate matters. Mr. Kaplan works with his estate planning clients to develop and implement an overall estate plan that recognizes the client's specific estate planning needs and objectives, and where possible, maximize tax benefits. In representing individuals and fiduciaries in trust and probate matters, he provides post mortem advice to trustees, personal representatives and beneficiaries in probate and trust administrations, both domiciliary and ancillary. Related activities for estates regularly include the preparation of estate tax returns.

Mr. Kaplan also works in the firm's tax and corporate practice groups in developing plans that address the client's family and business objectives since business succession planning and continuity of corporate control often overlap with a client's estate planning objectives. He regularly advises businesses and individuals in connection with the creation of corporations (regular and S corporations), partnerships and limited liability companies. His representation of business entities include sales and purchases of businesses, advice on choice of entity, formation, operations, conduct of corporate meetings, employment and non-compete agreements.

Mr. Kaplan joined Icard Merrill in 2006 after 8 years of private practice in Bradenton and New York City. Mr. Kaplan is a member of the Florida Bar Association, Manatee County Bar Association and Sarasota County Bar Association. He received his B.A., with honors from Siena College in Albany, New York, his J.D., *cum laude*, from Quinnipiac University School of Law in Hamden, Connecticut, and his Master of Laws (LL.M) in Taxation from the University of Florida, College of Law. While in school, Mr. Kaplan was the Publication Editor of the *Quinnipiac Law Review* and a Co-Managing Editor of the *Florida Tax Review*. Mr. Kaplan is admitted to practice law in the States of Florida, New York and Connecticut. He primarily practices in Bradenton at the firm's Lakewood Ranch office but regularly meets with clients at the firm's Main Street office in Sarasota.

Practice Areas

Estate Planning

Probate

Trusts and Estates Advice and Administration

Taxation

Business Entities (Corps, LLCs, Partnerships)

Education

Siena College in Albany, New York

J.D., cum laude, from Quinnipiac University School of Law in Hamden, Connecticut

Masters of Law in Taxation from the University of Florida

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