

## David B. Heedy

PARTNER



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A partner in the Corporate, Tax & Transactions and Wealth Strategies Service Lines, David represents both companies and individuals in the areas of mergers and acquisitions, entity selection and formation, corporate governance matters, tax planning, business succession planning, and transitions. He also serves wide range of clients in general estate planning, including the preparation and implementation of basic estate planning documents and more complex generational and wealth preservation estate planning.

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David's legal acumen allows him to serve clients in:

- Preparing trusts, both revocable and irrevocable
- Complex estate and tax planning strategy
- Assisting out-of-state residents in establishing Florida domiciles
- Acquisition agreements and asset purchase agreements on behalf of small business owners
- Forming business entities and preparing articles of organization, bylaws, and operating agreements, as well as maintaining corporate records and filing annual reports for corporations and LLCs
- Advising families on business succession matters, including buy/sell agreements, life insurance issues, and tax-

### SERVICE LINE

Corporate, Tax and  
Transactions  
Wealth Strategies

### INDUSTRY SECTOR

Financial Institutions &  
Insurance  
Health Care  
Manufacturing  
Real Estate, Construction, &  
Development

minimization

David enjoys exploring Sarasota's vibrant restaurant scene, traveling to see Pearl Jam, cheering on the Florida Gators, and spending time with his wife and their son.

## BAR & COURT ADMISSIONS

Florida, 2015

## PROFESSIONAL & COMMUNITY AFFILIATIONS

- Sarasota County Bar Association, Estate Planning & Probate Section
  - Section Chair (2020-2021)
  - Steering Committee Member (2019-Present)
- Florida Bar, Real Property, Probate and Trust Law Section
  - Attorney/Trust Officer Liaison Conference Steering Committee Member (2023-Present)
  - Member
- Florida Bar, Tax Section, Member
- Economic Development Foundation of Sarasota County, General Counsel

## HONORS

- Best Lawyers: Ones to Watch, Tax Law, Trusts and Estates, 2022-2024
- *SRQ Magazine*: Elite Top Attorneys, Wills, 2021-2023

## PRIMARY LOCATION

Sarasota, FL

## EDUCATION

LL.M., Taxation, University of Florida Levin College of Law, 2016

J.D., with honors, Florida State University College of Law, 2015

B.S., with honors, Biology, University of Florida, 2012