akerman

People

Stacey Prince-Troutman

Chair, Trusts and Estates Practice

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vCard

Stacey Prince-Troutman works with individuals and families in probate, trusts and estates, and transfer tax controversy matters and has significant experience working with business owners and professional athletes.

Stacey focuses her practice on administering estates and trusts; planning for wealth transfer and transfer tax minimization; preparing gift and estate tax returns; drafting sophisticated estate plan documents; drafting documents related to the formation, management, and succession of closely held entities; asset protection planning; and forming and obtaining tax exempt-status for 501(c)(3) charitable organizations, as well as addressing issues related to the governance and management of the entity. She frequently advises clients on fundraising, tax compliance, and crafting meaningful charitable giving strategies.

Active in the community and profession, Stacey frequently speaks on asset protection topics as well as conducting seminars on estate planning issues. She is a past member of the board of directors for the Coalition for the Homeless of Central Florida.

Honors and Distinctions

- *Best Lawyers,* 2021-2025, Listed in Florida for Trusts and Estates Law
- Florida Fellows Institute of the American College of Trust and Estate Counsel (ACTEC), Graduate of Class II
- *Florida Trend's* Legal Elite, 2023-2024, Notable Women Leaders in Law, Honoree
- *Florida Trend's* Legal Elite, 2016, 2020-2022, Listed for Wills, Trusts & Estates
- *Super Lawyers* Magazine, 2010-2012, Listed in Florida as a "Rising Star"
- Lorman Education Services, Distinguished Faculty

Areas of Experience

Trusts and Estates
Tax
Tax-Exempt Organizations
Probate and Fiduciary Litigation
Sports and Entertainment Law

Education

LL.M. in Taxation, University of Florida Levin College of Law, 2002
J.D., University of Florida Levin College of Law, 2001, cum laude
B.S.B.A., University of Florida, Finance, 1998, magna cum laude

Admissions

Bars

Florida
Texas

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December 02, 2024

Three Akerman Partners Recognized as *Florida Trend* Legal Elite Notable – Women Leaders in Law
December 05, 2023

Record Number of Akerman Lawyers Named to *The Best Lawyers in America* 2024 Guide
August 22, 2023

Affiliations

- The Florida Bar
  - Florida Probate Rules Committee, Member
  - Real Property, Probate and Trust Law, and Tax Law Sections, Member
- Coalition for the Homeless of Central Florida, Board of Directors

Published Work and Lectures

- National Business Institute, Speaker, “Trusts and Taxes in Florida From A to Z,” May 31, 2023
- National Trust Real Estate Association (NTREA), 2022 Educational Development Forum, Speaker, “Trust/Trustee Ownership of Real Estate,” June 14, 2022
- National Business Institute, Speaker, “Income Taxation of Trusts, Estates, and Individuals,” May 9, 2022
- *Orlando Business Journal*, Author, “What to Do —and Not Do — If You Want a Smooth Business Succession Plan,” November 5, 2021
- Probate and Pumpernickel, Palm Beach Atlantic University, Speaker, “2020 Tax Update,” March 10, 2020
- Financial Planning Association of Central Florida, Speaker, “SECURE Act and Recent Developments,” January 28, 2020
- Florida Bar, Speaker, “Ethics in Estate Administration,” November 15, 2019
- Lorman Education Services Webinar, Speaker, “Opportunities and Drawbacks of Directed Trusts,” November 7, 2019
- Central Florida Estate Planning Council, Speaker, “International Tax Planning: An Overview,” October 8, 2019
- Collier County Bar Association, Speaker, “Planning for the 99%,” May 2, 2019
- Lorman Education Services Webinar, Speaker, “Tax and Estate Planning for Clients Relocating to Florida,” March 12, 2019
- Strafford CLE Webinar, Speaker, “Section 199A for Trusts and Estates: Planning Techniques for Counsel, Optimizing QBI Deductions, Multiple Trusts,” March 12, 2019
- Financial Planning Association of Central Florida, Speaker, “Planning for the Ninety-Nine Percent,” January 29, 2019
- Florida Bar CLE Presentation, Speaker, “Love and Marriage in the Sunshine State: Entitlements of Surviving Spouse under Florida Law,” November 2, 2018
- BNY Mellon Wealth Management, Probate & Pumpernickel, Speaker, “Estate Planning After the 2017 Tax Act,” October 9, 2018
- Lorman Education Services, Speaker, “Tax and Estate Planning for Clients Relocating to Florida,” June 27, 2018
- Financial Planning Association of Central Florida’s 28th Annual Symposium, “Estate Planning and Income Tax Consequences,” March 2018
- The National Business Institute, “Probate Process from Start to Finish,” November 13, 2017
- Orange County Bar Association, “Rights of Surviving Spouse,” October 31, 2017
- *ActionLine: A Publication of The Florida Bar Real Property, Probate & Trust Law Section*, “Tax Apportionment Issues When Drafting For Blended Families,” October 30, 2017
- The National Business Institute, “Probate Bootcamp,” September 15, 2016

- The National Business Institute, “Probate Process from Start to Finish,” December 4, 2015
- The National Business Institute, “Probate Bootcamp,” September 15, 2012
- The National Business Institute, “Surviving Spouse’s Elective Share and Homestead Rights”
- The National Business Institute, “Top 9 Estate Planning Techniques,” October 27, 2009
- The National Business Institute, “Probate Process from Start to Finish,” December 8, 2006
- The National Business Institute, “Drafting of Wills and Trusts,” May 13, 2005
- The Metropolitan Orlando Urban League’s Young Professionals Financial Empowerment Series, “Estate Planning/Setting up a Will & Trust – It’s Never too Early to Think About Your Legacy”