

# George Lambeth Metcalf Jr.



## Of Counsel

Miami

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## Practice & Industry Areas

- Private Wealth Services

## Education

- University of Miami, Miami, Florida, LL.M. in Taxation, 2014
- Nova Southeastern University Shepard Broad Law Center, Fort Lauderdale, Florida, J.D., 2012
- Florida State University, Tallahassee, FL, B.S., 2009

## Bar & Court Admissions

- Florida Bar, 2012
- Washington D.C. Bar, 2015 (inactive)
- United States Tax Court, 2013
- U.S. District Court, Southern District of Florida, 2013

## Overview

George is of counsel in the firm's Private Wealth Services Group. George's practice is exclusively concentrated in domestic and foreign estate planning, with an emphasis on implementing effective tax reduction strategies, estate, trust and guardianship administration and fiduciary litigation. George advises domestic families and high net worth individuals in implementing advanced wealth transfer techniques, income and transfer tax planning, expatriation planning, business succession planning, as well as representing clients who have complicated family situations in complex estate, trust and guardianship administrations. George also advises various cross-border families and foreign high net worth individuals from Latin America and Europe on international estate planning matters,

pre-immigration planning, foreign investment in U.S. real property, and the taxation of domestic and foreign trusts. George believes the best approach in resolving any client problem begins with consideration of the client's personal and familial goals before consideration of their tax and business objectives.

George has authored articles, presented and commented on various topics regarding foreign investment in the United States, the Panama Papers leaks, wealth transfer planning for same-sex couples in light of the *Obergefell* decision, life insurance planning for divorce and death, planning with partnerships and S-corporations, and various complicated trust administration and fiduciary liability issues.

George is the son of a Cuban immigrant and speaks Spanish. He believes in the power of giving back to his community with his time and resources. He is an active participant in Dade Legal Aid's Put Something Back Pro Bono program and has dedicated a substantial amount of time over the years in helping various low-income families in probate and guardianship administration cases. He is actively involved with his alma mater Belen Jesuit Preparatory School and serves on the board of directors for the Belen Alumni Lawyers Section. George is also a member of the Cuban American Bar Association and has been recognized by his peers as a 2020 Rising Star for Tax in Super Lawyers.

## Honors

- *The Best Lawyers in America*®, "Ones to Watch", Tax, Trusts and Estates, 2022
- Super Lawyers 2020, Rising Star (Tax)
- Phyllis Coleman Award for Pro Bono Service, 2021

## Publications & Presentations

- The 2018 Partnership Audit Rules: Why All Partnerships (and LLC) Agreements Should be Amended. April 3, 2018, Advisory
- What Tax Reform Means for Your Estate Plan. January 3, 2018
- The Estate and Tax Planning Benefits of Shell Corporations, December 2016, Practical Law Strategies, Thomson Reuters
- FATCA's Due Diligence Expansion, September 2, 2015, Law Journal Newsletter and the Corporate Counselor
- 7 Corporate Trends in Law and Politics, January 26, 2015, The Corporate Counselor
- Internal-Use Software: More clarity on the R&D Tax Credit, December 2015, The Corporate Counselor

## Professional Associations & Memberships

- Florida Bar Association
  - Real Estate Probate and Trust Law Section, Member, 2012-present
  - Tax Section, Member, 2012-present
- Cuban American Bar Association
  - Member, 2013-present
- Belen Alumni Lawyers Section
  - Member, 2012-present
  - Board of Directors, 2015-present

## **Civic & Community Service**

- Belen Jesuit Alumni Lawyers Section, board of directors 2015-present