

# Kimberley A. Dillon

## Partner

Kimberley Dillon, is a Florida Bar Board Certified Wills, Trusts and Estates attorney, has a master's degree in taxation, and practices in the areas of estate planning, estate and trust administration, general business law, corporate services, tax controversy, and tax planning. She advises individuals and businesses on a variety of tax matters including individual income and estate tax consequences, corporate and partnership tax consequences, and international tax consequences. Ms. Dillon's recent experience includes:

- Advice concerning tax controversies against the Internal Revenue Service.
- Tax analysis and advice to individuals, limited liability companies, partnerships, and corporations.
- Assisting Board of Directors of not-for-profit corporations in obtaining and maintaining federal tax exemption.
- Drafting wills, trusts, charitable lead trusts, qualified personal residence trusts, qualified domestic trusts, and grantor retained annuity trusts.
- Consulting regarding preparation of individual, estate, and trust tax returns.
- Estate and trust administration, including complex estate and trust administration matters.



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### Naples Office

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## Legal Services

- Estate, Trust & Wealth Preservation
- Tax

## Education and Honors

- Northwestern University, Kellogg School of Management, Certificate, Quarles & Brady Leadership Program (2018)
- University of Florida Levin College of Law (LL.M., 2006)
  - Ms. Dillon (Belcastro) earned her LL.M. in Taxation from the University of Florida Levin College of Law where she served as a research assistant for Professor Denis Calfee.
- University of Florida Levin College of Law (J.D., *magna cum laude*, 2005)
  - Florida Law Review (Board Member). Order of the Coif. Phi Alpha Delta.
- Charleston Southern University (B.S., *summa cum laude*, 2002)
  - Degree: Environmental Management with a minor in Economics. NCAA Division I Tennis in singles and doubles.

## Bar Admissions

- West Virginia
- Florida

## Professional and Civic Activities

- Past President of the Collier County Women's Bar Association
- The Florida Bar (Member, Real Property and Probate Section)
- Past Chair of the YMCA of the Palms Board of Endowment (2011-2013)
- YMCA of the Palms Board of Endowment (Member)
- Past Board Member of the YMCA of the Palms Board of Trustees (2011-2013)
- Collier County Bar Association (Member)
- Fun Time Early Childhood Academy
  - Board of Directors (Member)
  - Governance Committee (Co-chair)
- Winged Foot Scholarship Foundation (Board of Directors)

## Professional Recognition

- Martindale-Hubbell® AV Preeminent Peer Review Rated
- Board Certified by the Florida Bar as a Specialist in Wills, Trusts and Estates
- Listed in *The Best Lawyers in America*® (2018–present: Trusts and Estates)
- Selected as a "40 Under 40" recipient by Gulfshore Business magazine (2011)
- Selected for inclusion in Florida Super Lawyers-Rising Star (2009, 2011-2017: Business/Corporate)
- Selected for inclusion in the Florida Super Lawyers (2018: Estate & Probate)

## Publications

09/21/17

### **IRS Grants Filing and Payment Deadline Relief to Taxpayers in Florida Counties Impacted by Hurricane Irma**

*Estate, Trust, & Wealth Preservation Alert*

03/13/11

### **"Why Estate Planning is Still Necessary"**

*Naples Daily News Estate Planning Council Supplement*

03/14/10

### **"Tax Impact of Owning Property Outside Florida"**



*Naples Daily News Estate Planning Council 25th Anniversary Supplement*