PREFACE

Beginning with this edition, it is my great honor and responsibility to carry forward the updating of this book, which I believe was originally written by co-authors John Gall Grimsley (b. 1938, d. 2025) and Professor David Powell, then edited and updated by author Jonathan A. Galler, any of whom may have been aided along the way by individuals who deserve name recognition but are unknown to me. Now I take up the task. I do not know whether I am a worthy successor. I just know that, as time goes forward, I intend to work hard toward making wise choices about which of their words continue into the next edition, and which are replaced by necessary updates. For now, nearly all their words remain, and rightfully so.

I recognize the importance of Florida's trust law today. I wish that had always been so. Early in my 30-year legal career, there was a popular television financial advisor who opined in nearly every episode that everyone's estate plan needed a trust without exception. Of course, that was an overstatement. But her viewers did not know. For this reason, too much of my early estate planning work involved trying to explain why a trust was not the client's best choice. Over time, I started to lack an appreciation for trust law.

All that changed when two wonderful parents came to me for help with estate planning. Their child was blessed with what folks would call nowadays unique abilities, or what was previously called special needs, or what was even longer ago called a handicap. I had the blessing of helping them, and doing so rekindled my appreciation for the power and the beauty of trusts and the trust law, and the need for them. Since then, I have seen so many additional examples of how the trust law can help meet needs that arise in so many important circumstances. Surely you have seen them, too. Surely you agree with me about the importance of trust law and a proper understanding of it. So for you, I promise to do my very best work in keeping this book up-to-date and as helpful as possible for your benefit and for the benefit of your clients.

I offer this word of thanks to those of you who have purchased this book, or used it, or taken part in this legal system of ours. No system of earthly justice will ever be perfect. I express my thanks to the voters, legislators, lawyers, litigants, and judges who try every day to make this system as perfect as human frailty will allow. Speaking of thanks, indulge me for a moment as I express my gratitude to my Bernadette for being the world's best

wife and mother; to our children Patrick James and Madeleine Marie for making my and Bernadette's world a better place; to my sister Alice Rose and my brother-in-law Steve, who always root for me in my every endeavor; to my predecessor authors whose work lives on in this edition; to my editor Alexi Maggio Schottland and her hard-working staff; and to all my other friends and family too numerous to mention who give me their moral support during this ongoing endeavor. I offer a special word of thanks to the lawyers of our state who work toward justice every day. Above all, I thank my Lord and Savior for the mercy He shows me, the ability He gives me to write this book, and all His other gifts to me, none of which I deserve. Those who need proof that our merciful Lord bestows His blessings even upon the undeserving need look no further than me.

Hopefully this book will serve its purpose of speeding you through your legal research so you can spend less time on the law and more time with your loved ones. As always, please keep your comments and suggestions coming. Call, text, or email me anytime. I enjoy hearing from my readers. I will answer any legal questions you may have (assuming I know the answer). Thank you for relying upon this book. I hope it serves you well. May God continue to bless us all.

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NOTE: This edition reflects all relevant legislative enactments and appellate case law decisions that were final as of September 1, 2026.