

Daniel Medina, B.C.S.
Medina Law Group, PA
402 S. Kentucky Ave, Suite 660
Lakeland, FL 33801
dan@medinapa.com
Tel: 863-682-9730
Fax: 863-616-9754



CURRICULUM VITAE

Education:

Northeastern Bible College B.A., 1983
New Orleans Baptist Theological Seminary, 1983-1985
University of Florida J.D., with honors, 1993
University of Florida, Master of Laws in Taxation, 1995

Certification:

Florida Bar Board Certified in Wills, Trusts and Estates
Certified Financial Planner

Professional:

Shareholder July 2010– Present
Medina Law Group, PA Lakeland, FL

Shareholder in a boutique law firm concentrating in estate planning, probate and business succession planning. **Florida Bar Board Certified in Wills, Trusts and Estates.** Broad based estate planning practice with growing and varied client base. In addition to wills and revocable trusts, practice includes sophisticated estate planning using family limited partnerships, irrevocable trusts (e.g. ILIT, QPRT, GRAT) as well as some experience with charitable remainder trusts and private foundations. Significant elder law practice involving guardianship, as well as planning to avoid guardianship, Medicaid planning and other asset protection planning. Practice also consists of involvement in corporate transactions, including asset sales, stock sales and stock redemption agreements, as well as other shareholder agreements. Significant probate experience including formal administration, summary administration and probate and trust litigation.

Shareholder

December 2007 – Present

Daniel Medina, P.A., Lakeland, FL

Shareholder in a two-lawyer firm concentrating in estate planning, probate and business succession planning. **Florida Bar Board Certified in Wills, Trusts and Estates.** Broad based estate planning practice with growing and varied client base. In addition to wills and revocable trusts, practice includes sophisticated estate planning using family limited partnerships, irrevocable trusts (e.g. ILIT, QPRT, GRAT) as well as some experience with charitable remainder trusts and private foundations. Significant elder law practice involving guardianship, as well as planning to avoid guardianship, Medicaid planning and other asset protection planning. Practice also consists of involvement in corporate transactions, including asset sales, stock sales and stock redemption agreements, as well as other shareholder agreements. Significant probate experience including formal administration, summary administration and probate and trust litigation.

Partner

December 2004– December 2007

Shelby, Medina & Stargel, LL.P., , Lakeland, Florida

Partner in a three-lawyer firm concentrating in real estate, estate planning, probate and business succession planning. Broad based estate planning practice with some established client base. Significant probate experience including formal administration, summary administration and probate and trust litigation.

Shareholder

August 31, 2000 – December 2004

Daniel Medina, P.A., Lakeland, FL

Shareholder in a one-lawyer firm concentrating in estate planning, probate and business succession planning. **Florida Bar Board Certified in Wills, Trusts and Estates.** Broad based estate planning practice with growing and varied client base. In addition to wills and revocable trusts, practice includes sophisticated estate planning using family limited partnerships, irrevocable trusts (e.g. ILIT, QPRT, GRAT) as well as some experience with charitable remainder trusts and private foundations. Significant elder law practice involving guardianship, as well as planning to avoid guardianship, Medicaid planning and other asset protection planning. Practice also consists of involvement in corporate transactions, including asset sales, stock sales and stock redemption agreements, as well as other shareholder agreements. Significant probate experience including formal administration, summary administration and probate and trust litigation.

Shareholder, Lakeland, Florida

April 1998 – August 31, 2000

Medina & Mundy, P.A.,

Shareholder in a two-lawyer firm concentrating in estate planning, probate and business succession planning. Broad based estate planning practice with some established client base. Significant probate experience including formal administration, summary administration and probate and trust litigation.

Associate

April 1, 1996 – April 10, 1998

Clark & Campbell, P.A., Lakeland, Florida

Established the firm's estate planning practice with the firm's existing clients and a significant stream of new clients. Practice included sophisticated estate planning using family limited partnerships, irrevocable trusts (e.g. ILIT, QPRT, GRAT) as well as some experience with charitable remainder trusts and private foundations. Practice also included involvement in corporate transactions, including asset sales, stock sales and stock redemptions. Some probate experience including formal administration, summary administration and trust litigation.

Professional (Associations and Memberships):

- ABA (American Bar Association, Member, Sections on Taxation, Real Property, Probate, and Trust Law)
- NAELA (National Academy of Elder Law Attorneys)
- AFELA (Academy of Florida Elder Law Attorneys)
- Lakeland and American Bar Associations
- Member Taxation Section
- The Florida Bar (Member, Sections on Taxation, Real Property, Probate, and Trust Law)
- Estate Planning Council of Polk County
- Christian Legal Society
- BNI
- Lakeland Chamber of Commerce

Seminars Presented:

- Key Issues in Estate Planning and Probate in Florida, 1/2003
- Lifetime and Testamentary Planning Techniques in Florida, 4/2003
- Planning for Long Term Care, 6/2015
- Estate Planning and Administration: The Complete Guide, 8/2015
- Trusts 101, 10/2015
- Variety of Local Seminars

Bilingual, Fluent in English and Spanish