

Curriculum Vitae
Phyllis C. Taite
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EDUCATION

University of Florida Levin College of Law, Gainesville, Florida **LL.M.**, Taxation

Florida State University College of Law, Tallahassee, Florida, **J.D.**

Florida Agricultural & Mechanical University, Tallahassee, Florida, **B.S.**

LAW SCHOOL ACADEMIC EXPERIENCE

- 2023-present Professor of Law, **The University of Oklahoma College of Law**, Norman, OK
Courses: Federal Income Taxation, Estate & Gift Taxation, Trusts & Estates, Partnership Taxation, Property, and Law, Policy & Social Justice
- 2021-2023 Professor of Law, **Oklahoma City University School of Law (“OCU”)**, Oklahoma City, OK
Courses: Federal Income Taxation, Estate & Gift Taxation, Trusts & Estates, Partnership Taxation, Property, and Law, Policy & Social Justice
- 2003-2021 Professor of Law, **Florida Agricultural & Mechanical University (“FAMU”) College of Law**, Orlando, FL
Courses: Federal Income Taxation, Estate & Gift Taxation, Wills & Estates, Trusts & Fiduciary Administration, Partnership Taxation, Property I, Property II, and Law, Policy & Social Justice

SCHOLARLY PUBLICATIONS

Taxing Wealth: Strategic Methods to Address Growing Inequalities 21 PITT. TAX REV. 119 (2023)

Welfare v Wealthfare: The Illusion of Equality in Tax Policy, 20 PITT. TAX REV. 363 (2023)

Remediating Injustices for Black Land Loss: Taking the Next Step to Protect Heirs’ Property, 10 BEL. L. REV. 301 (2023)

Inequality By Unnatural Selection: The Impact of Tax Code Bias on the Racial Wealth Gap, 110 KY. L. J. 639 (2022)

Teaching Cultural Competence in Law School Curricula: An Essential Step to Facilitate Diversity, Equity & Inclusion in the Legal Profession, 2022 ULR 813 (co-authored with Nicky Boothe) (2022)

May the Odds Be Ever in Your Favor: How the Tax Cuts and Jobs Act Fortified the Great Wealth Divide 48 PEPP. L. REV. 1023 (2021)

Tax Code Bias and its Starring Role in Perpetuating Inequalities, 72 S. C. L. REV. 735 (2021)

Making Tax Policy Great Again: America You've Been Trumped, 24 FLA. TAX REV. 240 (2020)

Freedom of Disposition v Duty of Support: What's a Child Worth, 2019 WIS. L. REV. 325 (2019)

Saving the Farm or Giving Away the Farm: A Critical Analysis of the Capital Gains Tax Preferences, 53 San Diego L. REV. 1017 (2016)

Taxes, the Problem and Part of the Solution: A Model for Vanishing Deductions and Exclusions for Residence-Based Tax Preferences, 59 N. Y. L. SCH. L. REV. 361 (2014/2015)

Exploding Wealth Inequalities: Does Tax Policy Promote Social Justice or Social Injustice, 36 W. NEW ENG. L. REV. 201 (2014)

Change We Can't Believe In...Or Afford: Why the Timing Is Wrong to Reduce the Estate Tax for the Wealthiest Americans, 42 U. MEM. L. REV. 493 (2012)

The Estate and Gift Tax Implications of Self-Settled Domestic Asset Protection Trusts: Can You Really Have Your Cake and Eat It Too? 44 NEW ENG. L. REV. 25 (2009)

The Elusive Cap and Gown: The Impact of Tax Policy on Access to Higher Education for Low-Income Individuals and Families, 10 BERKELEY J. AFR. AM. L. POL'Y 182 (2008)

ACADEMIC PUBLICATIONS

Phyllis C. Taite, *New Money: No Problem, No Tax*, JOTWELL (October 10, 2024) (reviewing Miranda Perry Fleischer, *A New Look at Old Money*, 98 S. Cal. L. Rev. __ (forthcoming, 2024) available at SSRN (March 4, 2024)), <https://trustest.jotwell.com/new-money-no-problem-no-tax/>.

A Path for Wealth and Cultural Restoration for the Gullah-Geechee Residents of the Low Country, JOTWELL (October 26, 2023) (reviewing Brenda D. Gibson, *The Heirs' Property: Racial Caste Origins & Systemic Effects in the Black Community*, __ CUNY L. Rev. __, (forthcoming, 2023) available at SSRN (Aug. 31, 2022)), <https://trustest.jotwell.com/a-path-for-wealth-and-cultural-restoration-for-the-gullah-geechee-residents-of-the-low-country/>

Sometimes the Road Is Less Traveled Because It's the Wrong Direction, JOTWELL (November 29, 2022) (reviewing Matthew Van Leer-Greenberg, *Family Limited Partnerships: Are They Still a Viable Weapon in the Estate Planner's Arsenal?*, 25 Roger Williams U. L. Rev. 37 (2020)

Flps With Estate Plans, Tax Stringer, (November 1, 2021)

If a Will is Never Probated Does it Make a Sound? (June 22, 2021) (reviewing Katheleen Guzman, *Wills Speak*, 85 Brook. L. Rev. 647 (2020) <https://trustest.jotwell.com/if-a-will-is-never-probated-does-it-make-a-sound/>

Can the Wealth Tax Effectively Serve as a Backstop to Estate and Gift Taxes?, JOTWELL (May 25, 2020) (reviewing Jason Oh, Eric Zolt, *Wealth Tax Design: Lessons from Estate Tax Avoidance*) <https://trustest.jotwell.com/can-the-wealth-tax-effectively-serve-as-a-backstop-to-estate-and-gift-taxes>

Waging War on Dynastic Wealth with a Wealth Tax, JOTWELL (May 27, 2019) (reviewing Eric Kades, *Of Piketty and Perpetuities: Dynastic Wealth in the Twenty-First Century (and Beyond)*, 60 B. C. L. Rev. 145 (2019)), <https://trustest.jotwell.com/waging-war-on-dynastic-wealth-with-a-wealth-tax/>

Is Marriage a Proxy for Wealth?, JOTWELL (July 4, 2018) (reviewing Erez Aloni, *The Marital Wealth Gap*, 93 Wash. L. Rev. 1 (2018)), <https://trustest.jotwell.com/is-marriage-a-proxy-for-wealth/>

Can You Really Have Your Cake and Eat it Too?, JOTWELL (July 7, 2017) (reviewing Mark Krogstad and Matthew Van Heuvelen, *Domestic Asset Protection Trusts: Examining the Effectiveness of South Dakota Asset Protection Trust Statutes for Removing Assets from a Settlor's Gross Estate*, 61 S.D. L. Rev. 378 (2016)), <https://trustest.jotwell.com/can-you-really-have-your-cake-and-eat-it-too>

Estate of Purdue: A Blueprint for FLPing Estate and Gift Tax RAP session, Tax Notes, (Feb. 2017)

Estate of Holliday: FLPing the Script, Estate and Gift Tax RAP session, Tax Notes (Jan. 2017)

Testamentary Freedom and the Implied Right to Inherit, JOTWELL (August 15, 2016) (reviewing Adam J. Hirsch, *Airbrushed Heirs: The Problem of Children Omitted from Wills*, 50 Real Property, Trust and Estate L.J. 175 (2015), available at SSRN), <https://trustest.jotwell.com/testamentary-freedom-and-the-implied-right-to-inherit/>

Crummey Delivers Another Knockout Punch to the IRS, Estate and Gift Tax RAP session, Tax Notes, (Nov. 2015)

Is Federal Preemption in Beneficiary Designation Cases Part of the Problem or Solution?, JOTWELL (August 3, 2015) (reviewing John H. Langbein, *Destructive Federal Preemption of State Wealth Transfer Law in Beneficiary Designation Cases: Hillman Doubles Down on Egelhoff*, 67 Vand. L. Rev. 1665 (2014)), <https://trustest.jotwell.com/is-federal-preemption-in-beneficiary-designation-cases-part-of-the-problem-or-solution/>

An Ounce of Planning is Worth a Pound of Litigation Prevention, Estate and Gift Tax RAP session, Tax Notes (May 2015)

Offshore Trustees Beware: No Pre-Levy Notice for You, Estate and Gift Tax RAP session, Tax Notes (January 2015)

Madoff Madness in Estate of Kessel, Estate and Gift Tax RAP session, Tax Notes (November 2014)

A Nightmare in Elwood Estate, Estate and Gift Tax RAP session, Tax Notes (July 2014)

Teaching Trusts and Estates, JOTWELL (August 8, 2014) (reviewing Robert H. Sitkoff, *Trusts, and Estates: Implementing Freedom of Disposition*, 58 St. Louis U.L.J. 643 (forthcoming, 2014), available at SSRN), <https://trustest.jotwell.com/teaching-trusts-and-estates/>

Trombetta: The Two Trust Tango, Estate and Gift Tax RAP session, Tax Notes (April 2014)

Should a History of Spousal Abuse Serve As A Presumptive Bar To Inheritance?, JOTWELL (June 11, 2013) (reviewing Spivack, Carla, *Let's Get Serious: Spousal Abuse Should Bar Inheritance*, 90 Or. L. Rev. 247 (2011)), <https://trustest.jotwell.com/should-a-history-of-spousal-abuse-serve-as-a-presumptive-bar-to-inheritance/>

Planning for Incapacity: Financial Issues, Continuing Legal Education Seminar, Sterling Education Services, Inc. (February 2013)

The Anatomy of a Will Contest, JOTWELL (October 12, 2012) (reviewing Gerry W. Beyer, *Will Contests - Prediction and Prevention*, 4 *Estate Planning & Cmty. Prop. Law J.* 1 (2011), available at SSRN), <https://trustest.jotwell.com/the-anatomy-of-a-will-contest/>.

Estate and Tax Law Issues: Advising Military Members and Their Families, Military Law Symposium, Florida Bar Convention (July 2008).

SELECTED ACADEMIC PRESENTATIONS

Invited Panelist, 2025 ABA Associate Deans Conference, **Creating Your Toolbox**, Salt Lake City, Utah, (June 2025)

Presenter, Experienced in Tax Conference, **Subsidies as Silent Spending: Tax Policy in Disguise**, University of San Francisco (June 2025)

Presenter, Texas Tax Professor Workshop, **Subsidies as Silent Spending: Tax Policy in Disguise**, University of San Francisco (May 2025)

Invited Presenter, **Tax Policy in a Space of Uncertainty: Through a Gendered Lens** University of Wisconsin Law School Business/Tax Colloquium (April 2025)

Participant, Critical Tax Conference, University of Wisconsin Law School (April 2025)

Panelist, American Tax Policy Institute, **Tax Policy in a Space of Uncertainty: Through a Gendered Lens**, Washington, D.C. (October 2024)

Presenter, Inheritance Inequality Symposium, **Tax Policy in a Space of Uncertainty**, Drexel University, Philadelphia. (September 2024)

Presenter, Lutie Lytle Scholarship Workshop, **Tax Policy in a Space of Uncertainty**, Duke University, Durham, North Carolina. (June 2024)

Presenter, Law and Society, **Tax Policy in a Space of Uncertainty**, Denver, Colorado. (June 2024)

Presenter, Critical Tax, **Tax Policy on Homeownership**, University of Florida, Gainesville, FL. (May 2024).

Invited Panelist, American Bar Association Tax Meeting, **Tax Policy on Homeownership**, ABA Tax Section, Washington, D.C. (May 2024).

Invited Presenter, **Is This a Gift- For Gift Tax Purposes?**, American College of Trust and Estate Counsel, (October 2023)

Invited Presenter, **Gift Tax Refresher**, American College of Trust and Estate Counsel, (October 2023)

Presenter, **Is Global Wealth Inequality Verification of Systemic Racial Bias**, Law and Society Conference (June 2023)

Invited Presenter, **Georgetown Tax Law and Public Finance Workshop** (March 2023)

Invited Presenter, **Tax Policy Ideas to Repair Racial Wealth Disparity**, Greater Milwaukee Foundation (March 2023)

Invited Speaker, **Social Justice Through a Tax Policy Lens**, Beverly Hills Bar Association (February 2023)

Invited Presenter, **Teaching Bias, Cultural Competency, and Racism**, University of Memphis Cecil C. Humphreys School of Law (February 2023)

Invited Presenter, **Protecting Dynastic Wealth: Perspectives on the Role of Estate and Gift Tax in Perpetuating Inequality**, The Federal Income Tax: Racially Blind but Not Racially Neutral Symposium, University of Pittsburgh Tax Review (Feb 2023)

Invited Presenter, **Teaching Tax Policy**, Association of American Law Schools, Taxation Section, Annual Conference (January 2023)

Invited Presenter, **The Forgotten 40 Acres: Using Tax Policy to Fund Reparations**, Seattle Bar Annual Estate Planning Seminar (October 2022)

Invited Presenter, **Remediating Injustices for Black Land Loss: Taking the Next Step Through Heirs' Property**, Emory Public Interest Committee Conference (October 2022)

Invited Presenter, **Rebuilding Generational Wealth Through Heirs' Property**, Belmont Law Review Symposium (September 2022)

Presenter, **Is Global Wealth Inequality Verification of Systemic Racial Bias**, Law and Society Conference (July 2022)

Invited Speaker, **Tax Policy and Social Justice**, IRS Counsel Speaker Series (June 2022)

Invited Speaker, **Wealth Taxation in Defense of Equal Citizenship**, Brookings Institute Tax Policy Center (May 2022)

Invited Speaker, **The Impact of Judge Ketanji Brown Jackson to the Supreme Court**, University of Central Oklahoma (April 2022)

Selected Presenter, **Do Taxing Systems Impact Income and Wealth Inequality? Investigating Disparities OECD Member and Contributing Countries**, Critical Tax Conference, Villanova University Charles Widger School of Law (March 2022)

Invited Panelist, **The Forgotten 40 Acres: Repairing Racial Wealth Disparity Using the Estate Tax and New Charitable Incentives**, American College of Trust and Estate Counsel Annual Meeting (March 2022)

Invited Panelist, **Roundtable: The Forgotten 40 Acres** American College of Trust and Estate Counsel Annual Meeting (March 2022)

Invited Presenter, **Ethical and Professional Obligations of Trust and Estate Lawyers in Times of Woe**, American Bar Association Professor's Corner (December 2021)

Invited Presenter, **Thurgood Marshall Institute Lab—What Do Taxes Have to Do with It? How Tax Policy Perpetuates Racial Inequities** (December 2021)

Selected Panelist, **Improving the U.S. Safety Net**, National Tax Association 114th National Conference (November 2021)

Invited Presenter, **May the Odds Be Ever in Your Favor: How the Tax Cuts and Jobs Act Fortified the Great Wealth Divide**, University of California Hastings Tax Speaker Series (November 2021)

Invited Panelist, **#INCLUDETHEIRSTORIES: Rethinking, Reimagining, and Reshaping Legal Education Symposium**, The University of Utah S.J. Quinney College of Law (November 2021)

Selected Panelist, **The Racial Wealth Gap Symposium**, University of Kentucky J. David Rosenberg College of Law (October 2021)

Invited Presenter, **The Impact of Tax Code Bias on the Racial Wealth Gap**, Loyola Policy Tax Colloquium, Loyola Law School (October 2021)

Discussion Group Participant, **Teaching Trusts and Estates Discussion Group**, SEALS Conference (August 2021)

Invited Presenter, **Ethics and Professionalism for Trusts and Estates Attorneys**, ACTEC Florida Fellows Meeting (July 2021)

Invited Presenter, **Estate Tax Inclusion and FLP Planning**, Florida Tax Institute Annual Conference (March 2021)

Invited Panelist, **Virtual Symposium on Taxation, Finance, and Racial Justice**, University of South Carolina School of Law (February 2021)

Invited Presenter, **Tax and Social Justice**, Vermont Bar Association (October 2020)

Invited Presenter, **Intersection of Race and Taxes**, Philadelphia Bar Association (October 2020)

Invited Panelist, **Executive Briefing, Zoom Panel on A Conversation About Racial Equity in the Workplace** (July 2020)

Invited Panelist, **AALS Tax Section Zoom Panel on Inclusion and Addressing Racism in the Federal Income Tax Course** (July 2020)

Selected Presenter, **Making Tax Policy Great Again: America, You've Been Trumped**, Critical Tax Conference, University of Florida (April 2020)

Invited Speaker, **Wealth and Inequality in 2017 Tax Cuts and Jobs Act**, Pepperdine Law Review, Pepperdine University Rick J. Caruso School of Law (March 2020 COVID-19 cancellation)

Discussion Group Participant, **Teaching Trusts and Estates Discussion Group**, SEALS Conference (August 2019)

Selected Participant, “**Thirty-Fourth Economics Institute for Law Professors**,” Henry G. Manne Program in Law and Economic Studies at the Antonin Scalia Law School at George Mason University (July 2019)

Presenter, **What Trusts Have to do with Wealth and Inequality: Truth (and Lies) About the Law's Role in Economic Disparity**, Law and Society Conference (May 2019)

Moderator/Presenter, **Tax Policy and Social Justice**, National People of Color Conference, American University (March 2019)

Invited Presenter, **What's a Child Worth: Freedom of Disposition v Duty of Support**, Wisconsin Law Review Wills, Estates and Trusts Symposium (October 2018)

Invited Presenter, **Making Tax Policy Great Again: America, You've Been Trumped**, Boston College Tax Policy Workshop, Boston College (April 2018)

Paper Presentation: “**The Child Left Behind: A Comparative Analysis of a Child's Right to Inherit**,” ClassCrits VIII Workshop, Tulane Law School (November 2017)

Invited Presenter, **The Child Left Behind: A Comparative Analysis of a Child's Right to Inherit**, Wills Trusts and Estates Meets Gender, Race and Class II (September 2016)

Presenter, **Obtaining an Educational Delay for the Judge Advocate General's Corps**, Florida A&M University's Army ROTC Leadership Conference (March 2015)

Presenter, **Life as a JAG Officer**, Florida A&M University's Army ROTC Leadership Conference (March 2015)

Presenter, **Helping Law Students of Color to Develop a Professional Identity**, Southeast/Southwest People of Color Scholarship Conference (March 2015)

Invited Presenter, **Is There a Future for Black Boys in America? A Candid Discussion of the Education, Criminalization, and Victimization of Our Black Boys**, Freedom from Fear: Black Childhood & Other Dangers Conference, University of Kentucky (November 2014)

Moderator/Invited Panelist, **Teaching Ethics: Incorporating Ethical Issues from Basic Tax to LLM Courses**, Teaching Taxation Committee, American Bar Association Taxation Section Mid-Year Meeting (January 2014)

Paper Presentation, **Taxes: Part of the Problem or Part of the Solution to Diminishing Debt**, ClassCrits VI Workshop, Southwestern Law School (November 2013)

Paper Presentation, **Exploding Wealth and Economic Inequality: The Failures of the Taxing System**,” Wills, Trust & Estates, Meets Gender, Race & Class, Oklahoma City University School of Law (September 2013)

Panelist, **Social Engineering and the Tax Code: A Record of Success?** SEALS Conference (August 2013)

Discussion Group Participant, **Tax Policy Discussion Group**, SEALS Conference (August 2013)

Faculty, **“Are You Smarter Than a Law Student?” Ethics and Professionalism Module**, National Black Prosecutors Association Conference, (July 2013)

Faculty, **“Securing a Teaching Position,” Expanding Your Career Module**, National Black Prosecutors Association Conference, (July 2013)

Paper Presentation, **Taxes: Part of the Problem or Part of the Solution to Diminishing Debt**, Lutie Lytle Black Women Law Faculty Writing Workshop (June 2013)

Faculty, **“Planning for Incapacity: Financial Issues,”** Continuing Legal Education Seminar, **Elder Law: Legal, Financial, and Health Care Issues**, Sterling Education Services, Inc. (February 2013)

Paper Presentation, **Exploding Wealth and Economic Inequality: The Failures of the Taxing System**, ClassCrits V Workshop (November 2012)

Invited Panelist, **Getting to Tenure: Citing Potential Reviewers, Soliciting Comments, Sending Reprints, Creating a List of Reviewers, and Presenting Your File**, Lutie Lytle Black Women Law Faculty Writing Workshop, Suffolk University Law School (June 2012)

Panelist, **Death, and Taxes: Now and Beyond 2012**, AALS Tax Section and Trusts & Estates Section Joint Session, Washington, D.C. (January 2012)

Paper Presentation, **Change We Can’t Believe In... Or Afford: Why the Timing Is Wrong to Reduce the Estate Tax for the Wealthiest Americans**, Junior Tax Scholars Workshop, University of California Irvine, School of Law (June 2011)

Paper Presentation, **Save Our Homes Save Our Jobs: How the Estate Tax Can Bring Calm to the Economic Storm**, Lutie Lytle Black Women Law Faculty Writing Workshop, Texas Southern University, Thurgood Marshall School of Law (June 2011)

Panelist/Moderator, **Change Isn’t Always a Good Thing: Re-Visiting the Estate Tax and Charitable Contribution Deduction**, Third National People of Color Legal Scholarship Conference, Seton Hall University School of Law (September 2010)

Paper Presentation, **Benevolence v Bureaucracy, The Impact of Over-Regulation of Tax-Exempt Organizations**, Junior Tax Scholars Workshop, Notre Dame University Eck Hall of Law (June 2010)

Presenter, **“From the Backpack to Briefcase,”** Women’s Law Caucus Conference, **Women & the Economy in the 21st Century**, Florida A & M University College of Law (March 2010)

Rapporteur, International Law Conference, **“Towards an International Law of Black Women: New Theory New Praxis,”** Florida A&M University, College of Law (March 2010)

Paper Presentation, **Self-Settled Domestic Asset Protection Trusts: Can You Really Have Your Cake and Eat It Too?** Association of American Law Schools, Trusts and Estates Section, Annual Conference (January 2010)

Paper Presentation, **Homestead is Homestead, Isn't It: Why Bosonetto Should be Put to Death Once and For All**, Lutie Lytle Black Women Law Faculty Writing Workshop, Seattle University School of Law, (June 2009)

Paper Presentation, **Self-Settled Domestic Asset Protection Trusts: Can You Really Have Your Cake and Eat It Too?** Junior Tax Scholars Workshop, Brooklyn Law School (June 2009)

Moderator, “*Assigning Responsibility for Post-Hurricane Fay Flooding and Avoiding Its Repetition*,” Property Law Seminar, **Contemporary Water Law Issues in Central Florida of Floodwater Management and Surface Water Diversions**, Florida A & M University College of Law (April 2009)

Speaker, Press Conference, “*De-bunking the Tax Myths Regarding Barack Obama’s Economic Plan*,” Barack Obama’s Florida Campaign for Change Orlando Headquarters (September 2008)

Presenter, “*Basic Law School Success Principles*,” American Bar Association, Council for Legal Education and Opportunity (July 2008)

Presenter, “*Estate and Tax Law Issues: Advising Military Members and Their Families*,” Florida Bar Convention, Military Law Symposium, Boca Raton, Florida (June 2008)

Paper Presentation, **The Elusive Cap and Gown: The Impact of Tax Policy on Access to Higher Education for Low-Income Individuals and Families, Setting the Agenda: Examining Critical Legal Issues Facing African-Americans and Minority Communities in the 2008 Elections**, University of California Berkeley School of Law (November 2007)

SELECTED SERVICE

The University of Oklahoma

Associate Deans Council 2024-present
ABA Site Visit Committee 2024-present
Curriculum Committee, 2024-present
Strategic Development Working Group 2024-2025
Admissions Committee, 2023-2024
Tenure and Promotions Committee, 2023-present
Faculty Advisor, Latin American Law Student Association 2023-2024
Clinical Director Search Committee 2023-2024

National

ACTEC, Academic Memberships Committee 2025-present
AALS, Tax Section Vice Chair, 2025-present

AALS, House of Representatives 2024-2025
AALS, Trusts and Estates Executive Member 2023-present
ACTEC, New Fellows Steering Committee, 2023-present
ACTEC, Estate and Gift Tax Committee 2022-present
ACTEC, Legal Education Committee 2022-present

SELECTED PROFESSIONAL ORGANIZATIONS AND ASSOCIATIONS

Executive Committee Member, Association of American Law Schools, Trusts & Estates Section, 2024-present
Committee Member, Joint Center for Political and Economic Studies Tax Policy Advisory Committee, 2023-2025
Executive Committee Member, Association of American Law Schools, Taxation Section, 2022-present
Academic Fellow, American College of Trust and Estate Counsel, 2021-present
Member, Florida Bar Probate Rules Committee, 2019-2022
Member, Real Property and Probate Trust Law Section of the Florida Bar, 2007-2010, 2016-2021
Member, Florida Bar Continuing Legal Education Committee, 2006-2007, 2008-2011, 2015-2018
Faculty Liaison, Tax Section of the Florida Bar, 2006-2009, 2018-2022
Member, Central Florida Estate Planning Council, 2008-2009
Member, Orange County Bar Association, 2004-2008
Member, Leadership Orlando, since 2004
Member, American Bar Association, since 2003
Member, U.S. Court of Appeals for the Armed Forces, since 2000
Member, State Bar of Florida, since 1995

SELECTED PRACTICE EXPERIENCE

Zimmerman, Kiser & Sutcliffe P.A., Orlando, FL, Of Counsel (2007-2021) I have experience, through the creative use of revocable and irrevocable trusts, life insurance, charitable planning, and other techniques, in drafting documents to maximize benefits, minimize taxes and staying fully compliant with the law while taking advantage of the planning opportunities.

Judge Advocate General's Corps, Various locations (1995-2003) I gained significant experience in the following areas: estates and trusts, income taxation, family law, military justice, military law, administrative claims, criminal defense, hearings, landlord/tenant, consumer law, and insurance law. In addition, I taught Military Justice and Law of War Courses to commanders and soldiers.

SELECTED PRO BONO ACTIVITY

Estate Planning for Wealth Building, Habitat for Humanity Pathway to Homeownership Program
Wills for Heroes, Orange County Bar Young Lawyers Division
Estate Planning for Financial Awareness Seminar Delta Sigma Theta Incorporated
Estate Planning for Financial Awareness Seminar for Alpha Kappa Alpha Incorporated