PERSONAL VITA

DAVID F. POWELL

Birth date: June 1, 1947

Education:
New York University School of Law, LLM in Taxation, June, 1973
University of Texas School of Law, Juris Doctor with Honors (Coif), June, 1972
Southern Methodist University, BBA, June 1969

Professional Associations:
Member of The Florida Bar (admitted 1973)
Academic Fellow, American College of Trust and Estate Counsel

Employment Experience:
Holland & Knight, LLP (Of Counsel), 1997-present
Associate Professor of Law, Florida State University, 1978-present
Assistant Professor of Law, Florida State University, 1973-1978
Visiting Professor, University of Miami, Spring 2005
Visiting Professor, University of Illinois School of Law, Fall 1975
Visiting Professor, University of Texas School of Law, Summer 1979
Fulbright & Jaworski, Houston, Texas, Summer 1972

Teaching Experience:
Estate and Gift Taxation, First Year Property, Gratuitous Transfers (Decedent's estates), Estate Planning Seminar, Federal Corporate Income Taxation, Advance Corporate Tax Seminar, Business Planning Seminar, Estate Planning

Law Reform Activities
Scrivener for the Bar Augmented Share Committee (1994 – 1998)
Scrivener for the Ad Hoc Trust Revision Committee (2002 – present)

Publications:
Tye J. Klooster & David F. Powell, Blockbuster Guide To Drafting Florida Trusts, Trusts & Estates, Vol. 147 No 2 (February 2008)
John G. Grimsley & David F. Powell, Florida Law of Trusts (2008 Ed. West)
Administration of Trusts in Florida, Chapter 18: The New Florida Trust Code (5th Ed. The Florida Bar)
Administration of Trusts in Florida, Chapter 7: Lapse, Antilapse, and Descendible Beneficial Interests in Trusts (5th Ed. The Florida Bar)

John G. Grimsley & David F. Powell, Florida Law of Trusts (5th Ed. West)
The New Florida Trust Code, Part II, Vol. 80 Fla. B. J. (October 2006)
The New Florida Trust Code, Part I, Vol. 80 Fla. B. J. (July/August 2006)
Chapter 7: Lapse, Antilapse, and Descendible Beneficial Interests, Administration of Trusts in Florida (4th Ed. The Florida Bar)
Florida's Statutory Rule Against Perpetuities, 11 Fla. State L. Rev. 767 (1984)
Kelley, The Florida Bar Probate System, Ch 12: Tax Short Course (1990, 1996)
Proposed Changes in Florida's Elective Share Provisions, Part 1, Florida Bar Journal (Dec. 1995).
Proposed Changes in Florida's Elective Share Provisions, Part 2, Florida Bar Journal (Jan. 1996).
Estate Planning Tax Course, A Hypertext Tax Treatise, published annually by The Florida Lawyers Support Services, Inc. (1995 to present)
Drafting for Tax and Administration Issues, with Thomas Featherston, Jr., Nancy Henderson, and M. Read Moore, Section of Real Property, Probate and Trust Law American Bar Association (2000)
Planning for the Use of the Credit for Previously Taxed Property, West Group's Estate & Personal Financial Planning (October 2000)
Tax Implications of Crummey and Other Withdrawal Powers, West Group's Estate & Personal Financial Planning (January 2001)
Planning For Distributions From Traditional IRAs , West Group's Estate & Personal Financial Planning (February 2002)

Professional Speaking Engagements:
Estate Planning Tax Considerations, 2008 Wills, Trusts and Estates Certification Review Course; (Orlando, April 18th and 19th , 2008)
New Statutory Changes, Past and Future -Drafting to Avoid, Minimize or Embrace the Florida Elective Share Out of State Practitioners Division of the Florida Bar (New York, February 9, 2008)
The Florida Trust Code, East Coast Estate Planning Council (, West Palm Beach, October 25, 2007)
Florida's New Trust Code, North Florida Estate Planning Council (Jacksonville, September 11, 2007)
Florida's New Trust Code (an all day workshop with Sandra Diamond, Brian Felcoski and Laird Lyle), Tampa (September 14, 2006), Miami (September 15, 2006) and Kissimmee (September 27, 2006).
The Florida Trust Code, Tallahassee Regional Estate Planning Council (January 24, 2007)
The Florida Trust Code, What You Don't Know You Don't Know (and Why It Matters Now!), Out of State Practitioners Division of the Florida Bar (Orange Session), New York, New York, February 9, 2007

Estate Planning Tax Considerations, 2007 Wills, Trusts and Estates Certification Review Course; Orlando, April 13th and 14th , 2007.
The Florida Trust Code, Tampa Bay Estate Planning Council (April 18, 2007)
Workshop on the New Florida Trust Code for Trust Officers (Sponsored by Holland & Knight LLP) Fort Lauderdale (May 2, 2007) and Miami (May 3, 2007)
The Florida Trust Code, (??? Not sure of sponsoring organization) (Boca Raton, May 8, 2007)
The Florida Trust Code, Palm Beach County Bar Association (May 9, 2007)
Elective Share Revisited (with Bruce Stone), 2007 Attorney/Trust Officer Liaison Conference (Palm Beach, June 9 2007)
Florida Trust Code Panel Discussion (with Bill Lane, Sandra Diamond, Don Tescher and Laird Lyle), Tax Section of the Florida Bar Annual Meeting, Kissimmee, Florida, October 14, 2005
An Introduction to the Florida Trust Code, Out of State Practitioners Division of the Florida Bar (Orange Session), New York, New York, December 3, 2005
The Florida Trust Code – A Potpourri of Drafting Considerations, Out of State Practitioners Division of the Florida Bar (Blue Session), New York, New York, December 3, 2005
Panel Discussion of the Florida Trust Code (with Bill Lane, Sandra Diamond, and Gordon Spoor), The Eight Annual Estate, Tax, Legal & Financial Planning Seminar, All Children's Hospital Foundation, St. Petersburg, Florida, February 9, 2006
Estate Planning Tax Considerations, 2005 Wills, Trusts and Estates Certification Review Course; Orlando, April 8th and 9th , 2005.
Panel Discussion of the new Florida Trust Code, Real Property Probate & Trust Law section of the Florida Bar, May 27, Naples Florida
Coping With Florida's Elective Share: The Contingent Elective Share Trust; Naples, Florida, November 20, 2004.
Estate Planning Tax Considerations, 2004 Wills, Trusts and Estates Certification Review Course; Orlando, April 2nd and 3rd , 2004.
Advanced Estate Planning Tax Considerations, Tallahassee Regional Estate Planning Council, Tallahassee, May 2003
Florida Bar Estate Planning and Probate Certification Exam Review Course (Annually each Spring since 1986)
Elective Share Workshop, Hillsborough County Estate Planning Council, Tampa, January 10, 2003
Elective Share Workshop, The Elder Law & Estate, Guardianship & Trust Committee of the Orange County Bar Association, Orlando, April 30, 2002
Tax Changes under EGTRRA; IRA Distribution Planning, Florida State University College of Law, November 9, 2001
Professor Powell's Presentation on Advanced Tax Considerations in Estate Planning, Real Property, Probate & Trust Law section of the Florida Bar, November 8, 2001
Planning for Distributions From Individual Retirement Accounts, Florida Lawyers Education Association, Tampa, October 26, 2001
Elective Share Workshop, 2001 Elder Law Section Retreat, St. Petersburg, September 13, 2001
Estate Planning Under EGTRRA, Florida Chapter of the American College of Trust and Estate Counsel, Orlando, September 8, 2001

Elective Share Reform, Annual Business Meeting of the Florida Conference of Circuit Judges, Sand Key, June 27, 2000

Florida's Statutory Property Schemes: Rule Against Perpetuities, Trust Reformation, and Elective Share, Out of State Practitioners Division of the Florida Bar, New York, New York (December 2000)

Estate Planning After Repeal of the Federal Estate Tax, Florida Fellows Meeting of the American College of Trust and Estate Counsel, Orlando (October 2000)

Two Day Program on Basic Estate Planning, National Network of Estate Planning Attorneys, Orlando (October 2000)

Professor Powell's Presentation on Advanced Tax for Probate Practitioners, Tampa (September 2000)

Basic Tax Drafting, 34th Philip E. Heckerling Institute on Estate Planning (January 2000)

Florida's New Elective Share, Florida Bar Out of State Practice Division Annual CLE Program (December 1999)

Deferred Charitable Giving Part II (with Ed Koren of Holland & Knight), Estate Planning Counsel of Tampa; Estate Planning Counsel of Lakeland (November 1998)

Deferred Charitable Giving Part I (with Ed Koren of Holland & Knight), Estate Planning Counsel of Tampa; Estate Planning Counsel of Lakeland (May 1998)

Estate Tax Apportionment, Estate Planning Counsel of Greater Miami (April 1998)

Estate Tax Apportionment – The New Statute, American College of Trust and Estate Counsel, Florida Fellows Fall Meeting, Orlando (September1997)

Drafting Wills and Trusts: Tax Related Drafting, ABA Annual Meeting (August 1996)

The Augmented Estate and The Florida Elective Share, 1996 Attorney/Trust Officer Liaison Program (June 1996)

Drafting Wills and Trusts: Tax Related Drafting, ABA 7th Annual Spring CLE Institute (May 1996)

Charitable Giving For Florida's Future, the Florida Bar (March 1996)

Next: Computer Assisted Tax Planning, the Florida Legal Education Association (November 1995)

The Credit For Previously Taxed Property, The Florida Bar (May 1994)

The Palm Beach County Bar Association, Eleventh Annual Estate and Probate Seminar (1994)

Effective Use of Marital Deduction and Generation Skipping Clauses, The Palm Beach County Bar Association, Ninth Annual Estate and Probate Seminar (1992)

Drafting Techniques For The Marital Deduction, the Qualified Domestic Trust, and the Generation Skipping Transfer Tax, sponsored by The Florida State University College of Law (1990)

The Federal Estate and Gift Tax Changes Under ERTA, Florida State University College of Law CLE Program on "The Federal Tax Laws-- Changes in the Eighties," (October 1981)

Estate Planning Under the Tax Reform Act of 1976, National Practice Institute jointly with Professor A.J. Casner of Harvard and Professor Robert A. Stein of The University of Minnesota (Spring 1978)

Federal Tax Considerations in the Formation and Organization of a Closely Held Corporation, Tax Section of the Florida Bar (January 1978)

Carryover Basis Under the Tax Reform Act of 1976, the Florida Bar Continuing Legal Education Committee (October, 1976)