

## Donna L. Longhouse

Donna L. Longhouse has experience with estate and business planning; trust and estate administration; tax-exempt organizations and charitable planning; and taxation. She represents individuals of substantial means in connection with tax, business, charitable and estate planning; tax-exempt organizations; individuals and financial institutions in connection with the administration of trusts and estates.

### Presentations and Publications

#### Presentations

- "Estate Tax Planning in 2010," Presenter, Florida Bar Tax Section Meeting, July 2010
- "Foreclosure Issues in Estate and Trust Administration," Presenter, Suncoast Estate Planning Council, February 2010
- "Master the Details of Tax Procedure," Presenter, Tampa, Florida, March 2009
- "Trust Accounting Under the New Florida Trust Code," Presenter, Clearwater, Florida, 2006
- "Florida's New Elective Share Law, Part II," Presenter, CPE Extravaganza, Clearwater, Florida, 2005
- "Issues in Florida Probate Process," Presenter, Clearwater, Florida, 2004
- "Florida's New Elective Share Law, Part I," Presenter, CPE Extravaganza, Clearwater, Florida, November 2003
- "Planning in an Uncertain Environment," Presenter, St. Petersburg, Florida, September 2003
- "Cross-Border Living Workshop (US-Canada)," Presenter, Ritz-Carlton Naples, FL, February 2002
- "Family Limited Partnerships in Florida," Presenter, Tampa, Florida, October 2001

#### Publications

- "Using Trusts for Annual Exclusion Gifts to Skip Persons (updated for 2010)," Florida Bar Tax Section *Bulletin*, Winter 2010
- "Using Trusts for Annual Exclusion Gifts to Skip Persons (prior to 2010 tax law changes)," Hillsborough County Bar Association *Lawyer*, February, 2010
- "Estate Planning Using the §2702 Personal Residence Trust," Author, Florida Bar RPPTL Action Line, 1993

#### Professional Affiliations

- American Bar Association
- The Florida Bar: Tax Section, Vice Chair Estate and Gift Taxation, Federal Tax Division 2009-present; Real Property, Probate and Trust Law Section, Asset Preservation Committee Member
- Hillsborough County Bar Association: Past Chair, Tax Section
- Stetson University College of Law: Adjunct Professor
- Tampa Bay Estate Planning Council: President, 2006-2007; Officer, 2002-2006; Board of Directors, 1999-2001



#### Shareholder

Tampa

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#### Practice Areas

Estate and Gift Tax

Estate Planning, Estate Settlement and Trust Administration

Wealth Preservation, Trusts and Estates

#### Industries

Colleges and Universities

#### Education

LL.M., University of Florida Levin College of Law, Taxation, 1994

J.D., University of Florida Levin College of Law, 1993

B.A., University of South Florida, 1984

#### Bar Admissions

Florida

#### Court Admissions

U.S. Tax Court

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### **Community Involvement**

- Community Foundation of Tampa Bay, Tampa, Florida: Board of Trustees, Secretary, 2010-2012; Member, 2009-2010
- Florida Orchestra: Board of Directors, 2002-2009
- University of South Florida College of Arts & Sciences St. Petersburg, Florida: Community Advisory Board Member, 2008-present

### **Distinctions**

**AV Peer Review Rated** by Martindale-Hubbell

**The Best Lawyers in America**, 2010-2012