



Bea Rosenberg, CPA

Director

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Certification

- Certified Public Accountant, Kentucky

Service Areas

- Estate and gift taxation
- Fiduciary and individual income tax
- Estate planning

Industry Concentrations

- Trusts and estates

Education

- B.B.A., Accounting, 1985, MBA, 1990, University of Louisville

Professional Associations

- Kentucky Society of Certified Public Accountants
- American Institute of Certified Public Accountants
- Estate Planning Council of Louisville: Executive Committee 2005- present, Secretary Treasurer 2007-2008

Representative Client Solutions

- Used knowledge of various estate planning techniques to assist in reduction of potential estate and gift tax
- Implemented strategies to reduce alternative minimum tax through incentive stock option planning
- Used knowledge of generation skipping transfer laws to assist in planning to reduce potential GST tax

Civic Commitments

- Eliahu Academy (Louisville Jewish Community Day School): Board of Directors 2003-2005 & 2007-2008; Treasurer 2007-2008
- American Cancer Society: Gallop to the Goal Fundraiser 2001-2005
- Prevent Blindness Kentucky: Board of Directors 1992-1995
- Various volunteer activities with American Cancer Society, Women of Reform Judaism, and Eliahu Academy
- Focus Louisville Alumni

Selected Presentations

- University of Kentucky College of Law – Mid South Estate Planning Conference
- University of Louisville Louis A. Grief Tax Planning Institute
- University of Louisville Annual Estate Planning Institute
- Estate Planning Council of Louisville
- Louisville Bar Association Probate Section
- Lorman Educational Services
- Professional Education System, Inc. (PESI) on Fiduciary Income Taxation