

# WILLIAMS PARKER

## HARRISON DIETZ & GETZEN

ATTORNEYS AT LAW  
EST. 1925

Rose-Anne Frano is a board certified specialist in wills, trusts, and estates. Rose-Anne also serves as a member of the firm's management committee.

Rose-Anne focuses on estate, gift, and generation-skipping transfer tax planning for individuals and their families and on the administration of estates and trusts. With respect to planning matters, Rose-Anne is experienced in creating tax-efficient succession plans using a variety of traditional estate planning vehicles, charitable entities, and business entities.

On the administration side, Rose-Anne is experienced in preparing federal estate and gift tax returns, administering complex trusts and estates, including estate plans consisting of closely held businesses, and implementing complex post-mortem planning techniques.

Representative matters include:

- Drafting estate plans that consist of charitable gifting or trusts
- Preparation of federal estate tax returns, including 6166 analysis, portability, and business valuations
- Preparation of tax planning strategies with generational business succession and estate planning
- Administration of estates and trusts during estate litigation processes
- Planning with multi-million dollar IRA and retirement plans to be coordinated with estate planning

Rose-Anne joined the firm in 2003 immediately after receiving her LL.M. in taxation from the University of Florida. She became a partner in 2009.

### EDUCATION

LL.M. in Taxation, **University of Florida College of Law**,  
Graduate Assistant to Martin J. McMahon, Jr.  
J.D., **University of Florida College of Law**, With High Honors  
B.A., **Tulane University**, Cum Laude

### PRACTICES

Estate Planning, Business Succession, Estate & Trust Administration  
Tax

### ADMISSIONS & LICENSURE

**Bar**



Rose-Anne B. Frano

Partner

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Florida, Board Certified in Wills, Trusts, and Estates by The Florida Bar

## HONORS

Martindale-Hubbell, AV Preeminent  
Florida Super Lawyers, Rising Stars, 2010-2017  
Florida Super Lawyers, 2018  
Florida Trend, Up and Comer, 2010, 2012-2013, 2017

## PUBLICATIONS & PRESENTATIONS

Life Happens: Prepare Now to Reduce Loved Ones Stress (10/28/17)  
Retirement Plan Beneficiary Designations: Go Ahead and Take a Second Look (2/28/2017)  
Florida Estate Planning: Understanding the Nuances, Inside the Minds: Estate Planning Client Strategies 2016-2017 ed., Aspatore Books, a division of Thomson Reuters  
A Proactive Approach to Help Client's Businesses Operate Smoothly in Times of Transition, Inside the Minds: Family and Business Succession Planning, 2016 ed., Aspatore Books, a division of Thomson Reuters  
Transferring Control: Minimize Federal Taxes (5/2/2016)  
IRS and the Art Advisory Panel (9/8/2015)  
Florida Trusts and Estates Planning Strategies for a Client Base Developed in a Mobile and Technologically Advanced Society, Inside the Minds: Strategies for Trusts and Estates in Florida, 2014 ed., Aspatore Books, a division of Thomson Reuters  
Co-author, Chapter 8, Advantages and Disadvantages of Living Trusts, Basic Estate Planning in Florida, 8th edition

## PROFESSIONAL & CIVIC ENGAGEMENT

**Sarasota Orchestra**, Board of Directors  
**Easter Seals**, Past Member and Chair (2014), Board of Directors  
**Junior League of Sarasota**, Past Member  
**Leadership Sarasota**, Class of 2012, Leadership Council 2013-2014  
**Sarasota County Bar Association**, Estate Planning & Probate Section, Past Chair  
**Sarasota County Bar Association**, Steering Committee