

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

BAR & 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