

JASON E. HAVENS

Havens & Miller, P.L.L.C.

Florida (Main) Office:

4481 Legendary Dr., Ste. 204, Destin, FL 32541

Tennessee (Satellite) Office:

9005 Overlook Blvd., Brentwood, TN 37027

850-424-6442 (W - FL) • 615-543-6442 (W - TN)

866-346-7782 (F)

jason@truststatelaw.net (E)



PROFESSIONAL EXPERIENCE

Private Practice, Bluewater Bay (Niceville) & Destin, FL (April 2001 - present);
Nashville, TN (June 2007 - present)

Focused tax law practice concentrating on charitable planning, tax-exempt organizations, complex intra-family transfers (including installment sales, business entities, and irrevocable trusts), and international estate planning. Clients include affluent families and charitable foundations.

Henderson, Franklin, Starnes & Holt, P.A., Fort Myers & Sanibel, FL
Estate Planning Associate (May 2000 - April 2001)
Summer Associate (Law Clerk) (Summer 1998 & Summer 1999)

EDUCATION

Regent University School of Law, Virginia Beach, VA (Distance/Executive Program)
LL.M. in International Taxation, May 2003

- LL.M. Scholarship Award
- Thesis: "A Comparison of Recent United States Trust Planning Opportunities with Similar Offshore Opportunities"

University of Miami School of Law, Coral Gables, FL
LL.M. in Estate Planning, May 2000

- Graduate Law Scholarship

University of Tennessee College of Law, Knoxville, TN
J.D., August 1999

- Katz Memorial Scholarship
- Research Editor, Tennessee Business Law Journal, 1998 - 1999
- Research Assistant to Professor Amy Morris Hess (Successor Author, BOGERT, THE LAW OF TRUSTS AND TRUSTEES)

Lipscomb University, Nashville, TN
B.A., magna cum laude, May 1996

PROFESSIONAL ORGANIZATIONS

[The Florida Bar](#) (September 2000 - present)

Real Property, Probate & Trust Law Section

- Estate & Trust Tax Planning Committee (2003 - 2004)
- Charitable Organizations & Philanthropic Planning Committee

[Tennessee Bar Association](#) (July 2006 - present)

[American Bar Association](#) (August 1999 - present)

Section of [Real Property, Trust & Estate Law](#)

- Editor, "Technology: Probate," [Probate & Property](#) (2004 - 2007)
- Member, Asset Protection Planning Committee
- Member, Charitable Planning Committee
 - Vice Chair (August 2006 - July 2007) & Co-Chair (August 2007 - present)
- Standing Committee Appointments:
 - Vice Chair, Public Information & Web Committee (2003 - 2005)
 - Member, Publications Committee (July 2004 - December 2007)
 - Member, Technology Committee (2006 - 2009)
 - Member, Communications Committee (2009 - present)

Section of [Taxation](#)

- Exempt Organizations Committee (December 2006 - present)

SELECT BOARDS OF DIRECTORS

Florida Endowment Foundation for Vocational Rehabilitation ([The Able Trust](#))

Director (2005 - present) & Treasurer (2008 - present)

The Estate Planning Council of the Emerald Coast, Inc. ([EPCEC](#))

Co-Founder & President (2004 - 2006); Member (2004 - present)

SELECT AWARDS

AV Rated ("Preeminent"), [Martindale-Hubbell](#)

Board Certified in Wills, Trusts & Estates Law, [The Florida Bar](#)

Board Certified Estate Planning Law Specialist (EPLS), [Tennessee Commission on Continuing Legal Education and Specialization](#)

Fellow, [American Bar Foundation](#) (July 2006 - present)

[Marquis Who's Who](#)

Who's Who in American Law® (14th (2005), 16th (2007) & 18th (2009) eds.)

Who's Who in America® (60th (2006) - 65th (2011) eds.)

JASON E. HAVENS

Havens & Miller, P.L.L.C.

Florida (Main) Office:

4481 Legendary Dr., Ste. 204, Destin, FL 32541

Tennessee (Satellite) Office:

9005 Overlook Blvd., Brentwood, TN 37027

850-424-6442 (W - FL) • 615-543-6442 (W - TN)

866-346-7782 (F)

jason@truststatelaw.net (E)



PROFESSIONAL EXPERIENCE

Private Practice, Bluewater Bay (Niceville) & Destin, FL (April 2001 - present);
Nashville, TN (June 2007 - present)

Focused tax law practice concentrating on charitable planning, tax-exempt organizations, complex intra-family transfers (including installment sales, business entities, and irrevocable trusts), and international estate planning. Clients include affluent families and charitable foundations.

Henderson, Franklin, Starnes & Holt, P.A., Fort Myers & Sanibel, FL
Estate Planning Associate (May 2000 - April 2001)
Summer Associate (Law Clerk) (Summer 1998 & Summer 1999)

EDUCATION

Regent University School of Law, Virginia Beach, VA (Distance/Executive Program)
LL.M. in International Taxation, May 2003

- LL.M. Scholarship Award
- Thesis: "A Comparison of Recent United States Trust Planning Opportunities with Similar Offshore Opportunities"

University of Miami School of Law, Coral Gables, FL
LL.M. in Estate Planning, May 2000

- Graduate Law Scholarship

University of Tennessee College of Law, Knoxville, TN
J.D., August 1999

- Katz Memorial Scholarship
- Research Editor, Tennessee Business Law Journal, 1998 - 1999
- Research Assistant to Professor Amy Morris Hess (Successor Author, BOGERT, THE LAW OF TRUSTS AND TRUSTEES)

Lipscomb University, Nashville, TN
B.A., magna cum laude, May 1996

PROFESSIONAL ORGANIZATIONS

[The Florida Bar](#) (September 2000 - present)

Real Property, Probate & Trust Law Section

- Estate & Trust Tax Planning Committee (2003 - 2004)
- Charitable Organizations & Philanthropic Planning Committee
 - Co-Chair, Education Subcommittee (2006 - 2007)

[Tennessee Bar Association](#) (July 2006 - present)

[American Bar Association](#) (August 1999 - present)

Section of [Real Property, Trust & Estate Law](#)

- Editor, "Technology: Probate," [Probate & Property](#) (2004 - 2007) (three columns per year)
- Member, Asset Protection Planning Committee
- Member, Charitable Planning Committee
 - Vice Chair (2006 - 2007) & Co-Chair (2007 - present)
- Standing Committee Appointments:
 - Vice Chair, Public Information & Web Committee (2003 - 2005)
 - Member, Publications Committee (2004 - 2007)
 - Member, Technology Committee (2006 - 2009)
 - Member, Communications Committee (2009 - present)
- Member, Estate Planner's and Administrator's Discussion List
 - Reporter (Topics: Technology; Charitable Planning), 37th - 39th, 41st - 43rd & 45th [Heckerling Institute on Estate Planning](#)

Section of [Taxation](#)

- Exempt Organizations Committee (December 2006 - present)

[Christian Legal Society](#) (August 1999 - present)

Vice President, Gift, Estate & Trust Planning Section (2004 - 2007)

Council on Foundations, Inc.

Member, [Philanthropic Advisors Network](#) (February 2007 - present)

[National Association of Estate Planners & Councils](#)

Member, The Estate Planning Council of the Emerald Coast, Inc. (2004 - present)

Member, Estate Planning Council of Northwest Florida, Inc. (2001 - 2004)

Member, Estate Planning Council of Lee County (FL), Inc. (2000 - 2001)

[National Committee on Planned Giving](#)

Member, Northwest Florida Planned Giving Council (2001 - present)

Member, Lee County (FL) Planned Giving Council (2000 - 2001)

Society of Trust and Estate Practitioners (STEP)

Member, Miami Chapter (2010 - present)

BOARDS OF DIRECTORS

Florida Endowment Foundation for Vocational Rehabilitation ([The Able Trust](#))

Director (2005 - present) & Treasurer (2008 - present)

[Boys & Girls Club of the Emerald Coast, Inc.](#)

Director (2002 - 2004)

National Association of Estate Planners & Councils (NAEPC)

[The Estate Planning Council of the Emerald Coast, Inc.](#)

Co-Founder & President/Director (2004 - 2006)

Estate Planning Council of Northwest Florida, Inc.

Director (2003 - 2004)

Partnership for Philanthropic Planning (National Committee on Planned Giving)

Northwest Florida Planned Giving Council (2001 - present)

Vice President/Director (2007 - present)

ADVISORY BOARDS

SmartDraw® Legal Solution

[Legal Advisory Board](#) (Trusts & Estates Member) (2005 - 2008)

Capital Trust Company of Delaware

Legal Advisory Board (2004 - 2006)

Sacred Heart Hospital Foundation

Chair, Destin-Area Planned Giving Subcommittee (2003 - 2005)

HONORS AND AWARDS

AV Rated ("Preeminent"), **[Martindale-Hubbell](#)**

Board Certified in Wills, Trusts & Estates Law, **[The Florida Bar](#)**

Board Certified Estate Planning Law Specialist (EPLS), **[Tennessee Commission on Continuing Legal Education and Specialization](#)**

Fellow, **[American Bar Foundation](#)** (July 2006 - present)

Accredited Estate Planner (AEP) Designation, NAEPC

Trust and Estate Practitioner (TEP) Designation, STEP

HONORS AND AWARDS (Continued)

Marquis Who's Who

Who's Who in American Law® (14th (2005), 16th (2007) & 18th (2009) eds.)

- Law Fields: Estate planning; Probate; Taxation, estate

Who's Who in America® (60th (2006) - 65th (2011) eds.)

2004 Excellence in Writing Award: Probate & Property (American Bar Association)
Best Technology/Practice Management Article

Who's Who Among American Law Students, 1997 & 1998

SELECT PUBLICATIONS

Havens, J., *Uncharitable Creditors: When Asset Protection and Charitable Planning Collide* (TBD 2010-2011) (following presentations on the same topic (below))

Havens, J., [*Firming Up Your Foundations: Creation of Lifetime Foundations to Avoid Post-Mortem Problems*](#), Family Foundation Advisor (November/December 2009)

Havens, J., [*Remote Control*](#), Law Technology News (July 2009)

Havens, J., *Forms for Donor Advised Fund Managers*, Family Foundation Advisor (March - April 2007)

Havens, J. & Weathers, CPA, P., [*Home Free*](#), Journal of Accountancy (January 2007)

Havens, J., *Eliminating Your Estate Taxes ... Even Without Congressional Repeal (via Contingent Charitable Gifts)!*, Sacred Heritage (Sacred Heart Hospital Foundation) (Fall 2006)

Havens, J., *Wealth Transfer Planning (Review)*, Law Office Computing (April 2006)

Havens, J., *Intuitive Estate Planner (Review)*, Law Office Computing (April 2006)

Havens, J., *SmartDraw Legal Solution (Review)*, Law Office Computing (October 2005)

Havens, J., [*TechnoFeature: Review: Tabs3 and PracticeMaster Premier Edition for the Modern Mobile Lawyer*](#), TechnoLawyer (October 11, 2005)

Havens, J., *X1 Desktop Search (Review)*, Law Office Computing (September 2005)

Havens, J., [*Estate Planning in a Post-Schiavo Era*](#), 1 Christian Lawyer 14 (Fall 2005)

Havens, J., *PracticeMaster Version 12 (Review)*, Law Office Computing (August 2005)

SELECT PUBLICATIONS (Continued)

Havens, J., *Tabs3 Version 12 (Review)*, [Law Office Computing](#) (June 2005)

Havens, J. & Hodges, Jr., Esq., J., [Deftly Drafting Estate Planning Documents](#), 18 [Probate & Property](#) 35 (July/August 2004) (Professor Susan Gary, ed.) (cited on page 856 in GERRY W. BEYER, TEACHING MATERIALS ON ESTATE PLANNING (3d ed. 2005) (West American Casebook Series))

Havens, J., *Creative Ways to Give ... and Receive*, [Sacred Heritage](#) (Sacred Heart Hospital Foundation) (Spring 2004)

Havens, J. & Toman, Esq., D., [Technological Tools for the Estate Planning Professional](#), 6 [Journal of Practical Estate Planning](#) 15 (February/March 2004)

Havens, J. & Wells, Esq., T., *Faithful Legal Services for the Benefit of Religious Organizations*, 17 [Probate & Property](#) 22 (September/October 2003) (Professor Thomas Featherston, ed.) (also published by [Planned Giving Design Center](#) on October 21, 2003)

SELECT LECTURES AND PRESENTATIONS

October 21, 2010: Lecturer, [Uncharitable Creditors: The Collision of Charitable and Asset Protection Planning](#), 7th [Institute on Christian Gift Planning](#), Orlando, Florida

October 14, 2010: Lecturer, [Uncharitable Creditors: The Collision of Charitable and Asset Protection Planning](#), National Conference on Philanthropic Planning, Orlando, Florida

May 7, 2010: Moderator & Panel Discussant, *Gifts Gone Wild: What to Do When Donors and Charities Don't See Eye to Eye*, 21st Annual Spring Symposia of the ABA Section of Real Property, Trust & Estate Law, Philadelphia, Pennsylvania

May 6, 2010: Moderator & Panel Discussant, *Charities in Transition: The Updated Status of Private Foundations, Supporting Organizations and Charitable Planning*, 21st Annual Spring Symposia of the ABA Section of Real Property, Trust & Estate Law, Philadelphia, Pennsylvania

April 22, 2010: Lecturer, *Asset Protection Using Charitable and Other Solutions*, The Able Trust, Destin, Florida

June 13, 2008: Co-Lecturer (with Vincent E. Bonnazoli, Esq.), [The Frozen T-CLAT](#), 11th Estate Planning (WealthCounsel National) Conference, San Antonio, Texas

November 9, 2007: Co-Lecturer (with Jeffrey Mobley, Esq.), *The Complete (Tennessee) Trust Course*, PESI, LLC, Nashville, Tennessee

SELECT LECTURES AND PRESENTATIONS (Continued)

November 5, 2007: Co-Lecturer (with Stephen E. Greer, Esq.), [Keeping and/or Advising Your Migratory Clients: Clients Moving to/from Florida \(or Separate Property States\) or a Community Property State](#), Middle Tennessee Estate Planning Council, Nashville, Tennessee

November 1 & 3, 2007: Lecturer, *Estate Planning*, Workshop Sessions I & V, 2007 [Christian Legal Society \(CLS\) National Conference](#), Destin, Florida

November 1, 2007: Lecturer, *Donor Advised Funds: A Comprehensive Exploration*, 4th [Institute for Christian Gift Planning \(CLS\)](#), Destin, Florida

October 31, 2007: Co-Lecturer (with Paul Hayes, Esq.), *Tennessee Legislative & Case Law Update*, Nashville Bar Association, Nashville, Tennessee

October 10, 2007: Co-Lecturer (with L. Bryan Howard, III, Esq.), [Donor Advised Funds: A Comprehensive Exploration](#), Nashville Planned Giving Council, Nashville, Tennessee

October 3, 2007: Co-Lecturer (with Elizabeth Lindsay-Ochoa), *Charitable Planning*, American Bar Association (ABA) Center for Continuing Legal Education, Part Three, [Essential Issues in Trust and Estate Law Teleconference Series](#), Chicago, Illinois (Telephonic)

September 24, 2007: Moderator & Panel Discussant, *Donor Advised Funds*, Joint Fall CLE Meeting of the ABA Section of Real Property, Trust & Estate Law and the ABA Section of Taxation, Vancouver, British Columbia (Canada)

September 20, 2007: Co-Lecturer (with Jeffrey Mobley, Esq. & Stephanie Edwards, Esq.), *UBS Estate Planning Update (Maggiano's)*, Nashville, Tennessee

August 24, 2007: Lecturer, *Saving Your Life (Insurance): Exemptions from Creditor Claims for Life Insurance*, MassMutual Quota Buster 2007 (Willis Conference Center), Nashville, Tennessee

August 9, 2007: Co-Lecturer (with Jason Meredith, Esq. & Jeremy Pharr, Esq.), *Estate & Charitable Gift Planning (Thompson & Associates)*, Nashville, Tennessee

August 8, 2007: Co-Lecturer (with Jeffrey Mobley, Esq.), *UBS Estate Planning Update (Marriot - Cool Springs)*, Franklin, Tennessee

May 29, 2007: Lecturer, *Electrifying Your Performance: Technology in an Estate Planning Practice*, American College of Trust and Estate Counsel (ACTEC) Alaska Fellows Meeting, Anchorage, Alaska (webinar)

May 5, 2007: Lecturer, [A Forest with Falling Trees: Charitable Planning Update](#), 3d WealthCounsel/Florida Forum Attorney Gathering, Sarasota, Florida

SELECT LECTURES AND PRESENTATIONS (Continued)

March 15, 2007: Lecturer, [*Electrifying Your Performance: Technology in an Estate Planning Practice*](#), Knoxville Estate Planning Council, Knoxville, Tennessee

November 4, 2006: Co-Lecturer (with Michael King, Esq.), *Estate Planning*, Workshop Session IV, 2006 [CLS National Conference](#), San Antonio, Texas

July 15, 2006: Lecturer, *Capacity, Clinicians, and Caregivers*, Plenary Session 7, Neuroethics: The New Frontier (The Center for Bioethics and Human Dignity), Deerfield, Illinois

March 16, 2006: Guest Lecturer/Professor, *Ethical Issues in Estate Planning: Warren Buffet to Anna Nicole Smith to the Cleaver Family*, Legal Ethics & Professional Responsibility Course (Professor Joshua E. Perry), Vanderbilt University School of Law, Nashville, Tennessee

March 14, 2006: Lecturer, *Electrifying Your Performance: Technology in an Estate Planning Practice*, Mississippi Estate Planning Council, Jackson, Mississippi

October 29, 2005: Lecturer, *Estate Planning*, Workshop Session IV, 2005 [CLS National Conference](#), Naples, Florida

October 27, 2005: Lecturer, *Advanced Charitable Gift Planning Techniques*, 3d [Institute for Christian Gift Planning](#) (CLS), Naples, Florida

February 24, 2005: Co-Lecturer (with Jerry J. McCoy, Esq.), *Personal Trust Strategies 2005: Charitable Gift Planning*, Capital Trust Company of Delaware, Fort Myers, Florida

October 28, 2004: Lecturer, *A Christian Counselor's Guide to Creating Computer-Generated Charitable and Other Estate Planning Documents*, 2nd [Institute for Christian Gift Planning](#) (CLS), McLean, Virginia

October 22, 2004: Lecturer, *Technological Tools for the Estate Planning Professional*, Workshop Sessions 4, 8 & 12, 24th [Southern California Tax & Estate Planning Forum](#), San Diego, California

October 30, 2003: Lecturer, *Faithful Legal Services for the Benefit of Religious Organizations*, 1st [Institute for Christian Gift Planning](#) (CLS), Destin, Florida

May 13, 2003: Lecturer, *Important Tax and Estate Planning Tools with Case Studies (on Charitable Gift and Estate Planning)*, Sacred Heart Hospital Foundation, Destin, Florida

May 12, 2003: Panel Discussant (with Jason R. Mosley, Esq.), *The Probate Process from Start to Finish in Florida*, National Business Institute, Pensacola, Florida

SELECT LECTURES AND PRESENTATIONS (Continued)

January 9, 2003: Panel Discussant (with Albert S. Barr, Esq. & Joseph G. Hodges, Esq.), *Timely Tech Topics and Ticklers: "Must Have" Software, "Must Know" Technology, and "Must Do" Stuff*, 37th Heckerling Institute on Estate Planning, Miami, Florida

December 5, 2002: Co-Lecturer (with Paul W. Storey, CPA), *Estate Planning at Year End (on Charitable Gift and Estate Planning)* (American Cancer Society), Destin, Florida

October 23, 2002: Lecturer, *Estate Planning under Current Tax & State Laws*, Synovus Trust Company & Vanguard Bank, Kelly Plantation Clubhouse, Destin, Florida

September 18, 2002: Lecturer, *Where Do You Go from Here: Effective Drafting & Legal Counsel for Immediate & Deferred Giving*, Pathways to Estate Planning, Okaloosa-Walton College Foundation, Inc., Niceville, Florida

July 8, 2002: Lecturer, *Charitable Planning Research Using Traditional and Technological Resources*, Northwest Florida Association of Fundraising Professionals, Pensacola, Florida

January 25, 2001: Panel Discussant (with Grace Gutierrez, Esq.), *Knowledge Is Power (on Insurance Trusts)*, Levin, Tannenbaum *et al.*, Fort Myers, Florida

October 2000: Panel Discussant (with William N. Horowitz, Esq. & Grace Gutierrez, Esq.), *Florida Legislative Changes in the Year 2000 Series*, Henderson, Franklin *et al.*, Fort Myers, Florida

TECHNOLOGY

Commentator, Technology Update Podcasts, Leimberg Information Services, Inc. ([LISI](#)) (January 2006 - present)

Creator/Webmaster, Legal Research for Estate Planners ([LREP](#)) (1997 - present)

- Featured as only substantive site on estate planning at ABA TECHSHOW® 2004
- Five stars by Robert J. Ambrogi, THE COMPLETE GUIDE TO THE BEST (AND WORST) LEGAL SITES ON THE WEB (1st ed. 2001 & 2d ed. 2004)

SELECT TECHNOLOGICAL REVIEWS

Reviewer, [Lawgic](#)™ Florida Wills & Trusts (2001 - present)

Reviewer, Intuitive Estate Planner™ ([IEP](#)) by Thomson/West (2003 - present)

Reviewer, [EstateWorks](#)™ (2003 - present)

Reviewer, WealthDocs™ by [WealthCounsel, LLC](#) (2004 - present)

NARRATIVE SUMMARY

Jason E. Havens is the managing attorney/member of the law firm of Havens & Miller, P.L.L.C., primarily practicing in its Bluewater Bay and Destin, Florida locations. His private law practice focuses on complex estate and charitable gift planning for affluent individuals and families and on behalf of charitable organizations. Havens is admitted to practice in Florida and Tennessee.

In addition to receiving his law degree (Doctor of Jurisprudence (J.D.)) in 1999 from the University of Tennessee College of Law, Havens received two graduate (Master of Laws (LL.M.)) law degrees: an LL.M. in International Taxation (with an emphasis on international estate planning and asset protection law) in 2003 from Regent University School of Law, and an LL.M. in Estate Planning in 2000 from the University of Miami School of Law. While in law school in 1997, Havens created Legal Research for Estate Planners (LREP), a personal website that is recognized as one of the premier Internet sites on estate planning. He received his Bachelor's degree (B.A.), *magna cum laude*, in 1996 from Lipscomb University, where he studied as an Honors scholar and served as president of the Phi Alpha Delta Pre-Law chapter.

Havens is an active member of The Florida Bar, the Tennessee Bar Association, the American Bar Association (ABA), the Christian Legal Society, and various sections, councils, and committees on estate planning. He was profiled (as part of the "Profiles in Membership" series) in the May/June 2007 issue of Probate & Property magazine due to his leadership in the ABA's Section of Real Property, Trust & Estate Law. Havens regularly publishes articles and commentary on estate and charitable gift planning in national and local publications including Probate & Property, the Journal of Practical Estate Planning, the Journal of Accountancy, the Family Foundation Advisor, and the Planned Giving Design Center. He has also lectured at various programs on estate planning, including the 37th annual Heckerling Institute on Estate Planning.

Havens is board certified by The Florida Bar (along with approximately seven percent of Florida lawyers) and specializes in Wills, Trusts and Estates Law. He is also board certified as an Estate Planning Law Specialist (EPLS) by the Tennessee Commission on Continuing Legal Education and Specialization, an agency of the Supreme Court of Tennessee. He is AV rated ("Preeminent") by Martindale-Hubbell. Based on his leadership in the legal profession, Havens was appointed as a Fellow of the American Bar Foundation (limited to one-third of one percent of the lawyers in the United States). Havens was selected for inclusion in multiple editions of various Marquis Who's Who® publications including Who's Who in America® and Who's Who in American Law® in the fields of estate planning, probate, and estate taxation.

Havens was also appointed by Governor John Ellis ("Jeb") Bush and reappointed by Governor Charles Joseph ("Charlie") Crist, Jr. to the board of directors of The Able Trust, a unique public/private charitable organization created in 1990 by the Florida Legislature to assist disabled Floridians in obtaining employment. Havens became Treasurer of The Able Trust in 2008.