

Curriculum Vitae

Phyllis C. Taite

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EDUCATION

University of Florida Levin College of Law, Gainesville, Florida **LL.M.**, Taxation, August 2006

Florida State University College of Law, Tallahassee, Florida, **J.D.**, December 1994

Florida Agricultural & Mechanical (A & M) University, Tallahassee, Florida, **B.S.**, April 1992

TEACHING EXPERIENCE

2015-present Professor of Law

2009-2015 Associate Professor

2006-2009 Assistant Professor

Florida A & M University College of Law, Orlando, FL

Subjects taught: Estate and Gift Taxation, Estates and Trusts, Estate Planning, Federal Income Taxation, Partnership Taxation, Property I and Property II. Research interests include topics in estate and gift taxation, estate planning, probate, trusts and income taxation.

2003-2006 Faculty (Pre-tenure earning)

Florida A & M University College of Law, Orlando, FL

Subjects taught include Estates and Trusts, Trial Practice, Torts, and Florida Constitutional Law. Established civil law practice clinics for the law school including the Bankruptcy Clinic, Guardian Ad Litem Clinic, Real Estate Externship and Orlando Police Department Externship.

SCHOLARLY PUBLICATIONS

Saving the Farm or Giving Away the Farm: A Critical Analysis of the Capital Gains Tax Preferences, forthcoming

Taxes, the Problem and Part of the Solution: A Model for Vanishing Deductions and Exclusions for Residence-Based Tax Preferences, 59 New York Law School Law Review 115 (2014)

Exploding Wealth Inequalities: Does Tax Policy Promote Social Justice or Social Injustice, 36 Western New England Law Review 201 (2014)

Change We Can't Believe In...Or Afford: Why the Timing Is Wrong to Reduce the Estate Tax for the Wealthiest Americans, 42 University of Memphis Law Review 493 (2012)

The Estate and Gift Tax Implications of Self-Settled Domestic Asset Protection Trusts: Can You Really Have Your Cake and Eat It Too? 44 New England Law Review 25 (2009).

The Elusive Cap and Gown: The Impact of Tax Policy on Access to Higher Education for Low-Income Individuals and Families, 10 Berkeley Journal of African-American Law & Policy Law Review 181 (2008).

OTHER PUBLICATIONS

Crummey Delivers Another Knockout Punch to the IRS, Estate and Gift Tax RAP session, Tax Notes, (Nov. 2015)

An Ounce of Planning is Worth a Pound of Litigation Prevention, Estate and Gift Tax RAP session, Tax Notes (May 2015)

Offshore Trustees Beware: No Pre-Levy Notice for You, Estate and Gift Tax RAP session, Tax Notes (January 2015)

Madoff Madness in Estate of Kessel, Estate and Gift Tax RAP session, Tax Notes (November 2014)

A Nightmare in Elwood Estate, Estate and Gift Tax RAP session, Tax Notes (July 2014)

Teaching Trusts and Estate, Journal of Thing We Like (Lots) (Jotwell), University of Miami School of Law, June 2014, available at <http://jotwell.com/?s=phyllis> (August 2014)

Trombetta: The Two Trust Tango, Estate and Gift Tax RAP session, Tax Notes (April 2014)

Should a History of Spousal Abuse Serve As A Presumptive Bar To Inheritance? Journal of Thing We Like (Lots) (Jotwell), University of Miami School of Law, available at <http://jotwell.com/?s=phyllis> (June 2013)

Planning for Incapacity: Financial Issues, Continuing Legal Education Seminar, Sterling Education Services, Inc. (February 2013)

The Anatomy of a Will Contest, Journal of Thing We Like (Lots) (Jotwell), University of Miami School of Law, available at <http://jotwell.com/?s=phyllis> (October 2012)

Estate and Tax Law Issues: Advising Military Members and Their Families, Military Law Symposium, Florida Bar Convention (July 2008).

SELECTED SCHOLARLY PRESENTATIONS

Invited presenter, **“Is There a Future for Black Boys in America? A Candid Discussion of the Education, Criminalization, and Victimization of Our Black Boys,”** Freedom from Fear: Black Childhood & Other Dangers Conference, University of Kentucky (November 2014)

Moderator/Invited Panelist, ***Teaching Ethics: Incorporating Ethical Issues from Basic Tax to LLM Courses***, Teaching Taxation Committee, American Bar Association Taxation Section Mid-year Meeting (January 2014)

Paper Presentation, **“Taxes: Part of the Problem or Part of the Solution to Diminishing Debt,”** ClassCrits VI Workshop, Southwestern Law School (November 2013)

Paper Presentation, "***Exploding Wealth and Economic Inequality: The Failures of the Taxing System,***" Wills, Trust & Estates, Meets Gender, Race & Class, Oklahoma City University School of Law (September 2013)

Panelist, "***Social Engineering and the Tax Code: A Record of Success?***" SEALS Conference (August 2013) Wills, Trust & Estates, Meets Gender, Race & Class

Discussion Group Participant, "***Tax Policy Discussion Group,***" SEALS Conference (August 2013)

Paper Presentation, "***Taxes: Part of the Problem or Part of the Solution to Diminishing Debt,***" Lutie Lytle Black Women Law Faculty Writing Workshop (June 2013)

Paper Presentation, "***Exploding Wealth and Economic Inequality: The Failures of the Taxing System,***" ClassCrits V Workshop (November 2012)

Invited Panelist, "***Getting to Tenure: Citing Potential Reviewers, Soliciting Comments, Sending Reprints, Creating a List of Reviewers, and Presenting Your File,***" Lutie Lytle Black Women Law Faculty Writing Workshop, Suffolk University Law School (June 2012)

Panelist, "***Death and Taxes: Now and Beyond 2012,***" AALS Tax Section and Trusts & Estates Section Joint Session, Washington, D.C. (January 2012)

Paper Presentation, "***Change We Can't Believe In... Or Afford: Why the Timing Is Wrong to Reduce the Estate Tax for the Wealthiest Americans,***" Junior Tax Scholars Workshop, University of California Irvine, School of Law (June 2011)

Paper Presentation, "***Save Our Homes Save Our Jobs: How the Estate Tax Can Bring Calm to the Economic Storm,***" Lutie Lytle Black Women Law Faculty Writing Workshop, Texas Southern University, Thurgood Marshall School of Law (June 2011)

Panelist/Moderator, "***Change Isn't Always a Good Thing: Re-Visiting the Estate Tax and Charitable Contribution Deduction,***" Third National People of Color Legal Scholarship Conference, Seton Hall University School of Law (September 2010).

Paper Presentation, "***Benevolence v Bureaucracy, The Impact of Over-Regulation of Tax Exempt Organizations,***" Junior Tax Scholars Workshop, Notre Dame University Eck Hall of Law (June 2010).

Paper Presentation, "***Self-Settled Domestic Asset Protection Trusts: Can You Really Have Your Cake and Eat It Too?***" Association of American Law Schools, Trusts and Estates Section, Annual Conference (January 2010).

Paper Presentation, "***Homestead is Homestead, Isn't It: Why Bosonetto Should be Put to Death Once and For All,***" Lutie Lytle Black Women Law Faculty Writing Workshop, Seattle University School of Law, (June 2009).

Paper Presentation, "***Self-Settled Domestic Asset Protection Trusts: Can You Really Have Your Cake and Eat It Too?***" Junior Tax Scholars Workshop, Brooklyn Law School (June 2009).

Paper Presentation, "***The Elusive Cap and Gown: The Impact of Tax Policy on Access to Higher Education for Low-Income Individuals and Families,***" Setting the Agenda: Examining Critical

Legal Issues Facing African-Americans and Minority Communities in the 2008 Elections, University of California Berkeley School of Law (November 2007).

SELECTED PROFESSIONAL AND COMMUNITY ACTIVITIES

Presenter, “*Obtaining an Educational Delay for the Judge Advocate General’s Corps*,” and “*Life as a JAG Officer*,” Florida A&M University’s Army ROTC Leadership Conference (March 2015)

Presenter, “*Helping Law Students of Color to Develop a Professional Identity*,” Southeast/Southwest People of Color Scholarship Conference (March 2015)

Faculty, “*Are You Smarter Than a Law Student?*” Ethics and Professionalism Module, National Black Prosecutors Association Conference, (July 2013)

Faculty, “*Securing a Teaching Position*,” Expanding Your Career Module, National Black Prosecutors Association Conference, (July 2013)

Faculty, “Planning for Incapacity: Financial Issues,” Continuing Legal Education Seminar, Elder Law: Legal, Financial, and Health Care Issues, Sterling Education Services, Inc. (February 2013)

Presenter, “*From the Backpack to Briefcase*,” Women’s Law Caucus Conference, Women & the Economy in the 21st Century, Florida A & M University College of Law (March 2010)

Rapporteur, International Law Conference, Towards an International Law of Black Women: New Theory New Praxis, Florida A&M University, College of Law (March 2010)

Moderator, “*Assigning Responsibility for Post-Hurricane Fay Flooding and Avoiding Its Repetition*,” Property Law Seminar, Contemporary Water Law Issues in Central Florida of Floodwater Management and Surface Water Diversions, Florida A & M University College of Law (April 2009)

Speaker, Press Conference to De-bunk the Tax Myths Regarding Barack Obama’s Economic Plan, Barack Obama’s Florida Campaign for Change Orlando Headquarters, (September 2008)

Presenter, “*Basic Law School Success Principles*,” American Bar Association, Council for Legal Education and Opportunity (July 2008)

Presenter, “*Estate and Tax Law Issues: Advising Military Members and Their Families*,” Florida Bar Convention, Military Law Symposium, Boca Raton, Florida (June 2008)

PRACTICE EXPERIENCE

2007- present **Zimmerman, Kiser & Sutcliffe P.A.**, Orlando, FL, Consultant, March 2007 to present. Draft advanced level estate planning documents, and probate administration.

1995-2003 **Judge Advocate General’s Corps**

Significant experience in the following areas: estates and trusts, income taxation, family law, military justice, military law, administrative claims, administrative law, ethics, criminal defense, interviewing, counseling and negotiation, administrative hearings, landlord/tenant, consumer law, and insurance law. In addition, served as instructor to teach Military Justice Courses and Law of War Courses to commanders and soldiers and Victim/Witness Liaison Officer for victims of criminal offenses.

1995-1995 Underground Tanks Attorney
Florida Department of Environmental Protection, Tallahassee, Florida. Significant experience includes Florida Administrative Practice.

PRO BONO ACTIVITY

2005-2013 Faculty Supervisor, Volunteer Income Tax Assistance (VITA)
Provided free income tax preparation and filing for low income taxpayers. In addition to assisting with the paperwork, we prepared documentation for the earned income tax credit which provided thousands of dollars to our clients. In addition to our on-site facility at the law school, we also partnered with Orlando Neighborhood Improvement Corporation to provide on-site free income tax preparation in three low income neighborhoods. I supervised 20-30 students in providing these services each year.

SERVICE

FAMU University

FAMU Inaugural Leadership Academy 2015-2016
Tenure and Promotion Committee 2012-2014
Curriculum Committee 2012-2013, 2014-2015
Southern Association of Colleges and Schools (SACS) Subcommittee 2013
Faculty Senator, 2009-2011, 2015-present
Faculty Senate Steering Committee, 2009-2011
Selection Committee for Investigator Awards, 2009-present
Distinguished Lecturer Series Committee Monthly meetings 2010-present
Task Force for Commercialization of University Innovations, 2009-present
Division of Research, Office of Technology Transfer, Licensing and Commercialization
Search Committee, 2009-2010

FAMU College of Law

Admissions Committee, 2003-2004, 2013-2014, 2014-present
Curriculum Committee, 2003-2007, 2011-2013, 2014-2015
Retention, Promotion and Tenure Committee 2012-present
Chair Curriculum Committee, 2012-2013
Faculty Co-Advisor, Women's Law Caucus, 2004-2012, 2015-present
Faculty Advisor, Estate Planning and Taxation Sodality, 2005-2008
Academic Standards Committee, 2003-2011
Grade Appeals Committee 2005-2011
Clinic Committee, 2003-2006
Budget Committee, 2004-2005, 2007-2008, 2012-2013, 2015-present

Library Committee, 2005-2006
Recruitment Committee, 2009-2010, 2012-2013

PROFESSIONAL ORGANIZATIONS AND ASSOCIATIONS

Member, Florida Bar Continuing Legal Education Committee, 2006-2007, 2008-2011, 2015-present
Member, Real Property and Probate Section of the Florida Bar, 2007-2010
Member, Central Florida Estate Planning Council, 2008-2009
Faculty Liaison, Tax Section of the Florida Bar, 2006-2009
Member, Orange County Bar Association, 2004-2008
Member, Leadership Orlando, since 2004
Member, American Bar Association, since 2003
Member, American Bar Association Tax Section, since 2003
Member, U.S. Court of Appeals for the Armed Forces, admitted to practice 1996
Member, State Bar of Florida, admitted to practice 1995

CONTINUING LEGAL EDUCATION COURSES

Planning for Incapacity: Financial Issues
Drafting Trusts Under the Florida Trust Code
Wills, Trusts and Estates Certification Course
Estate and Tax Law Issues: Advising Military Members and Their Families
Basic Probate and Guardianship
Oddities in Florida Probate
Practicing with Professionalism
Real Property and Probate
Basic Appellate Practice
2006 Florida Bar Diversity Seminar
2008 Florida Bar Diversity Seminar
Multi-jurisdictional Estate Planning
Planning for the Almost and Newly Dead
Annual Heckerling Institute on Estate Planning