

Biography: Jerry Simon Chasen

Jerry Simon Chasen is the principal of the Miami based Chasen & Associates, P.A., concentrating in the areas of estate planning and probate administration. He has been a Visiting Adjunct Professor at the University of Miami Law School Graduate Programs in both Tax and Estate Planning, from which he also received an LL.M. degree in Estate Planning. His J.D. degree with honors was granted by New York University School of Law in 1976, where he was an editor of the Law Review. Past President of the Miami-Dade County Planned Giving Council and longtime member of the Council's Board of Directors, Mr Chasen is a frequent speaker on matters of estate planning and related matters particularly those involving non-traditional family situations, and effective client relationships. Mr. Chasen has served as a member of the national Board of Directors of Lambda Legal Defense & Education Fund. He on the Professional Advisory Committee of the Foundation of Jewish Philanthropies, the United Way of Miami-Dade County, and the Dade Community Foundation, and is also chair of the DCF's LGBT Community Projects Fund Committee. Mr. Chasen received the Professional Advisor of the Year Award from the Miami Leave a Legacy Project in 2005, and the Eddy McIntyre Community Service Award from the National Gay & Lesbian Task Force in 2007. Mr. Chasen is also the co-Author of the book *The Rights of Authors, Artists, & Other Creative People*. He has also authored numerous articles, including the following:

"Estate & Gift Tax Planning for Non-Traditional Families," Probate & Property Magazine (Jan-Feb 2001);

"More Estate & Gift Tax Planning for Non-Traditional Families," Probate & Property Magazine (May-Jun 2001);

"How to Help Clients Accomplish More Effective Charitable Planning," Estate planning Magazine (Mar 2007)

"Retirement: Plan for More Than Money", Journal of Practical Estate Planning (Dec 2007-Jan 2008).

Through his firm, Mr. Chasen has created The Advisors Project, an ongoing educational program designed to encourage and support advisors in creating client relationships that are both satisfying and productive for philanthropy, and has spoken on the subject extensively. He has trained and is certified as a life coach by the College of Executive Coaching. In addition to the Florida bar, Mr. Chasen is admitted to the practice of law in California, New Mexico, and New York. Mr. Chasen's mission, and that of his firm, is "empowering conscious vision," and he assists his clients in intentionally creating their future, both through their legal documents and otherwise.

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