

MIAMI, Oct. 3, 2013 /PRNewswire-iReach/ -- Donlevy-Rosen & Rosen, P.A. today released a new article titled "*Discussing Asset Protection with your clients: A guide for attorneys, CPAs, and financial planners* ." ([Link to article](#))

The article, directed towards planning professionals, addresses such issues as client-friendly definitions of key terms, identifying eligible clients, and discussing asset protection with a client.

"Asset protection is now mainstream planning" said Attorney Howard Rosen. "Not only is it recommended for many individuals and businesses, but some planning professionals may be negligent if they don't recommend it to appropriate clients." Rosen recommends that planning professionals periodically review their client's circumstances to determine if a conversation about asset protection is required.

However, even when asset protection is advised, inexperienced planning professionals may find themselves committing malpractice if they attempt to implement asset protection without the necessary qualifications and experience. The American Bar Association, the American Institute of CPAs, and all State Bar Associations warn against engaging in actions in which the professional lacks the requisite experience and qualifications. "As a result," said Rosen, "we work with many attorneys, CPAs, and financial planners who prefer to refer clients in need of asset protection to us."

Rosen also continues to assist planning professionals in developing the necessary expertise to implement asset protection for their clients.

He will soon present one such seminar to the New Tax Lawyer Committee of the Tax Section of

the Florida Bar, and the Florida Association of Attorney-CPAs. The presentation, to be held on October 15th

for members of the two groups, will focus on "Drafting the Asset Protection Trust."

Persons interested and eligible to attend the presentation in Miami should contact Sam Phillips at (305) 447-0061 for more information.

Direct link to article: <http://trustne.ws/kql9g>

About Donlevy-Rosen & Rosen, P.A.

Donlevy-Rosen & Rosen, P.A. is law firm with a national practice focused on asset protection planning and offshore trusts. Attorneys Howard Rosen and Patricia Donlevy-Rosen co-founded the firm in 1991, and have since become internationally recognized authorities in the field of asset protection planning. On the web:

<http://protectyou.com>

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About Howard Rosen, Esq.

Rosen, an attorney and Certified Public Accountant, is the founding author of the BNA Tax Management Portfolio "*Asset Protection Planning*" (1994, 2002), and is considered an authority on offshore asset protection planning. Rosen was an adjunct professor at the University of Miami School of Law for twenty years. Full bio:

Resource for Professionals: Discussing Asset Protection With Your Client

Written by Australian Business

<http://trustne.ws/hdr>

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