YVONNE ALEMÁN, CPA, CFP®, MBA, MST

LICENSES

Certified Public Accountant, State of Florida, Issued September 2000
CERTIFIED FINANCIAL PLANNER™ Professional, Issued March 2004
Real Estate Sales Associate, State of Florida, Issued September 2008 (Inactive)

EDUCATION

UNIVERSITY OF MIAMI, Coral Gables, Florida
Master of Science in Taxation
Master of Business Administration, Specialization in Personal Financial Planning
Graduation, May 1999

UNIVERSITY OF MIAMI, Coral Gables, Florida
Bachelor of Business Administration, Accounting
Graduation with Honors, December 1997

PROFESSIONAL EXPERIENCE

April 2006 to Present

SELF-EMPLOYED CONSULTANT

- Effectively the “do-it-all, go-to person” for many small business owners
- Provide compliance and consulting services for high net worth individuals, Americans working abroad, Foreign Nationals working in the U.S., estates, trusts and small businesses
- Serve as a trusted advisor for high net worth families, CEOs and owners of closely-held, small and mid-size organizations
- Use independent analysis to identify and present strategies to streamline and create more efficient processes across various levels and departments within a client’s organization
- Prepare financial plans for clients that include tax, estate, investment, retirement and insurance recommendations and follow-up regularly to ensure proper implementation
- Offer complex and creative financial and estate planning advice on all levels to affluent families, executives and owners of client organizations
- Lead in the evaluation, planning and creation of business plans related to clients’ operational functions, including human resources, accounting, marketing, social media, website content, graphic design, management and processes
- Conduct research, spearhead the development of project proposals and present client deliverables
- Coordinate with clients’ other advisors to ensure that all team members are working toward the same goals
- Review, and in many cases, prepare clients’ required federal and state income tax returns and provide income tax planning recommendations from individual, corporate, partnership, estate, trust and gift perspectives
- Observe and deliver performance-related feedback and guidance to staff
- Call on current relationships to identify possible additional profit opportunities and potential referrals
- Participate in all aspects of business development activities, including attending community and professional networking functions to identify client prospects

October 2003 to April 2006

KAUFMAN, ROSSIN & CO., P.A.
Estate, Trust and Exempt Organizations Practice
Supervisor

- Manage complicated family group engagements
- Maintain and nurture existing and new client relationships
- Develop, implement and explain strategies to meet the client's specific needs using numerous planning techniques, including, but not limited to, Family Limited Partnerships, Grantor Retained Annuity Trusts, Charitable Lead Trusts, Intentionally Defective Grantor Trusts, Charitable Remainder Trusts, Irrevocable Life Insurance Trusts, and Qualified Personal Residence Trusts
- Handle estate and gift tax compliance and consulting services, such as post-mortem tax planning, preparation and review of estate and gift tax returns, preparation of final year of death U.S. Individual Income Tax Return for decedent, and representation before the IRS for estate tax examinations
- Provide fiduciary income tax planning, along with preparation of U.S. and state fiduciary income tax returns
- Prepare and review U.S. and state individual income tax returns for high net worth individuals, U.S. Return of Partnership Income, U.S. Income Tax Return for an S Corporation, U.S. Return of Private Foundation, U.S. Return of Organization Exempt from Income Tax, and miscellaneous payroll forms
- Provide feedback from a financial planning standpoint on estate planning legal documents
- Author estate and income tax planning memorandum addressing specific client issues

January 2000 to October 2003

KPMG LLP
Personal Financial Planning Services
Senior Tax Associate

- Assist in the development of personal financial plans designed to meet high net worth individuals' long-term goals
- Aid in the delivery of tax planning techniques and strategies that help preserve, manage, and perpetuate wealth from one generation to the next

International Executive Services
Senior Tax Associate

- Prepare and review U.S. and state individual income tax returns for high net worth individuals, Americans working abroad and Foreign Nationals working in the U.S.; U.S. Estate and Trust Income Tax Returns; U.S. Corporate and Partnership Income Tax Returns for both Domestic Corporations and Foreign Corporations operating in the U.S.; U.S. Tax Equalization Calculations; U.S. Hypothetical Tax Calculations
- Provide pre-departure and post-arrival U.S. tax counseling sessions to executives commencing U.S. or foreign work assignments, with a concentration on South American Expatriate and Inpatriate populations.
- Aid in the delivery of advice regarding global income and social tax legislation; payroll planning and compliance, including addressing benefit plan issues, international HR policy issues and the structuring of tax-effective compensation
- Participate in the design and implementation of international assignment policies, tax equalization policies, and expatriate remuneration programs, including global equity compensation planning and consulting
- Assist in the tax planning stage of foreign assignments by performing tax minimization cost projections and providing advice regarding the potential for U.S., state, social security and foreign tax savings and planning solutions
- Issue advice regarding the potential tax ramifications surrounding the renouncement of a U.S. Greencard or long term U.S. resident status
- Correspond with the IRS regarding individual tax matters
- Create and issue Statements of Qualifications and Proposals to Serve for potential KPMG clients

Spring 1999 **STERN & COMPANY LLP**
Seasonal Staff Accountant
- Prepared individual income tax returns, extensions, state income tax returns, Florida Intangible Tax Returns, and quarterly payroll tax returns
- Completed write-up work using Creative Solutions software

Spring 1997 **ARTHUR ANDERSEN LLP**
Intern
- Represented the Firm's State and Local Tax Practice in a reverse tax audit for Florida Power & Light
- Determined the taxable nature of purchases made by FPL during a time span of seven years
- Became an integral part in computing an estimated state sales & use tax refund due to FPL for overpaid taxes

LANGUAGES Spanish, fluent

PROFESSIONAL AFFILIATIONS & ACTIVITIES (HISTORICAL & CURRENT)
American Institute of Certified Public Accountants
Connect Florida Inaugural Class Graduate 2006 (Formerly Emerge Florida)
Coral Gables Chamber of Commerce
Estate Planning Council of Greater Miami
Financial Planning Association
Florida Institute of Certified Public Accountants
Greater Miami Alumni Club
Greater Miami Chamber of Commerce
Leadership Miami Graduate 2007
Our Lady of Lourdes Academy Alumni Association
REALTOR® Association of Greater Miami and the Beaches
The Partnership for Philanthropic Planning
University of Miami Alumni Association
University of Miami Mentor Program Participant 2006 through 2009

PHILANTHROPIC AFFILIATIONS & ACTIVITIES (HISTORICAL & CURRENT)
Animal Legal Defense Fund
Defenders of Wildlife
International Fund for Animal Welfare
Project Sunshine Miami, Chapter Leader
South Miami Hospital Pet Therapy Program, Volunteer
The Cuban American National Foundation

SOCIAL AFFILIATIONS & ACTIVITIES (HISTORICAL & CURRENT)
Cane Corso Association of America, Board Member (2014 to present)
Divers Alert Network
NAUI Worldwide, Divemaster
PADI
Society in America for Cane Corso Italiano
South Florida Hunter and Jumper Association
United States Equestrian Federation