

TAX & BUSINESS SERVICES

David S. Appel

David Appel is the partner-in-charge of Rachlin's Tax and Business Services division. He has more than 25 years of experience in domestic and international taxation in a variety of industries, and he has worked on complex IRS audits, business reorganizations, acquisitions and foreign business interests establishing U.S. operations. Mr. Appel is also a member of Rachlin's board of directors.

Mr. Appel also works extensively with family businesses in designing governance and family council structures. In connection with his work, he regularly assists family businesses in estate, succession and retirement planning, including preserving family businesses and wealth transfer to future generations.

In addition, Mr. Appel has lectured on numerous occasions in the area of tax, business succession planning and family planning. He has lectured to banking institutions and municipalities and at various tax conferences. He has also been featured in a *Miami Herald* article, where he prepared a financial plan for a South Florida family.

Mr. Appel serves on a board of directors and executive committee of a local charitable organization, providing long-range and financial planning and assisting in the design of the organization's governance model.

Professional & Civic Affiliations

American Institute of Certified Public Accountants (AICPA)
 AICPA Tax Division
 AICPA Personal Financial Planning Division
 Florida Institute of Certified Public Accountants (FICPA)
 Family Firm Institute
 International Tax Planning Association
 Diabetes Research Institute
 Temple B'nai Aviv

Articles, Seminars & Lectures

AICPA National Conference on Financial Planning
 AICPA National Conference on Estate Planning
 Family Firm Institute National Conference
South Florida Business Journal Key Partner Award,
 2006 Accounting-General Winner



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David S. Appel, CPA*/PFS
Partner

P R O F I L E

Areas of Expertise

Business Planning & Governance
 Estate Planning
 Succession Planning
 Family Wealth Planning

Key Clients

High-Net-Worth Individuals
 Agricultural Companies
 Broker-Dealers
 Real Estate Companies
 Manufacturers
 Distributors

education

Master of Business Administration
Nova Southeastern University
 Bachelor of Science, Accounting
University of Florida
 Bachelor of Science,
 Business Administration, Finance
University of Florida

*Licensed by the State of Florida

Rachlin Cohen & Holtz LLP