

Dr. Adam Scott Goldberg, JD, LLM, EdD
1792 Bell Tower Lane
Weston, Florida 33326
(954) 747-1400
(954) 315-3651 Fax
adam@rhglegal.com

BAR MEMBERSHIPS: Florida Bar 1995
District of Columbia Bar 2022
United States Tax Court Bar 1996
U.S. Southern District Court of Florida 1997
U.S. Northern District Court of Florida 1997
United States Supreme Court 2012

EDUCATION: Nova Southeastern University
Doctorate in Education, July 2019
Concentration: Organizational Leadership

University of Miami School of Law
Master of Laws in Estate Planning, May 1996

Nova Southeastern University, Shepard Broad Law Center
Juris Doctor, May 1995

University of South Florida
Bachelors of Science in Marketing, May 1992

SCHOLARLY

INTERESTS: Exempt Organizations, Probate, Wills/Trusts and Federal Wealth Transfer Tax

PUBLICATIONS: Charitable Case Law Update 2019/2020, Volume XXXVII, No. 2, Tax Section Bulletin (Fall 2020)

Attorney Survey Results on What Classes Law Students Should Take, Broward County Bar Association Barrister, 18-20 (August 2020)

Online Charitable Giving: Yea or Nay? Broward County Bar Association Barrister, 17 (July, 2018)

When Charitable Gift Agreements Go Bad: Why a Morals Clause Should be Contained in Every Charitable Gift Agreement, the Florida Bar Journal, December 2015, Volume 89, No. 10

Introducing the IRS Form 1023-EZ, Volume XXXI, No. 1, Tax Section Bulletin (Spring/Summer 2015)

10 Common Mistakes Made When Filing An IRS Form 1023 Application For Recognition of Exemption, Volume XXIX, No. 2, Tax Section Bulletin (Fall 2013)

The Dirty Dozen: Twelve Documents Every Attorney Should Review Before Serving on the Board of a Tax-exempt Organization, The Florida Bar Journal, November 2011, Volume 85, No. 9

What's in a Name? Naming Rights in Charitable Giving, Volume XXVII, No. 1, Tax Section Bulletin (Summer 2010)

Are Loans from Charitable Organizations Legal?, Volume XXVI, No. 6, Tax Section Bulletin (August 2009)

Charitable Issues at Election Time - A Brief Look at IRS Revenue Ruling 2007-41, Volume XXVI, No. 1, Tax Section Bulletin (October 2007)

A Look at CEO Compensation Issues for Tax Exempt Organizations, Volume XXV, No. 1, Tax Section Bulletin (September 2006)

The ABC's of the New Form 1023, What to Expect with the New IRS Exemption Organization Application, Volume XXIV, No. 1, Tax Section Bulletin (October 2005)

Is Church Bingo Legal?, Thoughts on Avoiding Unrelated Business Income for Tax Exempt Organizations, Volume XXII, No. 1, Tax Section Bulletin (September 2003)

The Death of the Florida Estate Tax, Volume 35, Issue 3, Broward County Bar Association Barrister, 9 (March, 2003)

Avoiding Director Liability in Tax Exempt Organizations in Florida Before It Is Too Late, Volume XXI, No. 1, Tax Section Bulletin (October, 2002)

Endangered Species; A Historical Perspective of the Federal Wealth Transfer Tax Volume XIX, No. 1, Tax Section Bulletin (September, 2000)

AWARDS/HONORS: 2022 Graduate of Class V of Florida Fellows Institute of the American College of Trust and Estate Counsel

2022 Alumni of the Year (STUEY Award) Nova Southeastern University including 2022 Alumni of the Year (STUEY Award) Nova Southeastern University College of Law

2021/2022 recognized as a Top Lawyer in Trusts and Estates by Fort Lauderdale Illustrated

2017 through 2022 recognized as a Florida Super Lawyer in Tax

2017 Volunteer Excellence Award - American Lung Association

2010/2011/2012 Adjunct Professor of the Year, Nova Southeastern University Law Center

Member, Nova Southeastern University Ambassadors Society (since 2013)

2016 Board Member of the Year, American Lung Association of the Southeast (Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina and South Carolina)

2010 Board Member of the Year, American Lung Association of the Southeast (Florida, Georgia & South Carolina)

2007 Board Member of the Year, American Lung Association of the Southeast (Florida, Georgia & South Carolina)

2007 Planned Giving Excellence Award presented to Krause & Goldberg P.A. from the American Lung Association

2005 Planned Giving Excellence Award presented to Krause & Goldberg P.A. from the American Cancer Society

National Board Member - American Lung Association (July 2006-July 2012)

Chair of National Field Operations - American Lung Association (2009-2011)

AV individual peer review rating from Martindale-Hubbell since 2000

AV firm peer review rating from Martindale-Hubbell since 2002

Graduate of the Fundamentals of Fundraising Course sponsored by the Association of Fundraising Professionals (2012)

Chairman, Nova Southeastern University Planned Giving Council (2014 to 2021)

President, American Lung Association of Southeast Florida (2004-2006)

Secretary, American Lung Association of the Southeast (2011-2013)

Board Member, American Lung Association of the Southeast (1998-2016)

Advisors Philanthropy Award, Jewish Community Foundation (2017)

Co-Chair 17th Annual Joint Tax and Estate Planning Seminar (2018) with Jewish Federation of Broward, Community Foundation of Broward and United Way of Broward

Paul Harris Fellow Plus 4 as recognized by the Rotary Foundation of Rotary International

LECTURER:

Florida Bar, Florida Trust School presented by the Florida Bankers Association (2004 to the present), Florida Bankers School (2021), Florida Institute for Certified Public Accountants, Broward County School System, Planned Giving Council of Broward County (2021), Partnership for Philanthropic Planning of Miami-Dade County, Morgan Stanley, Northern Trust, Paine Webber, Comerica, Wells Fargo, Institute for Paralegal Education, Broward Council on Aging (2021) Greater Fort Lauderdale Chamber of Commerce, North Miami Beach Chamber of Commerce; Pembroke Pines Chamber of Commerce, Weston Chamber of Commerce (2021), Broward County Bar Association (2021), Association of Fund-Raising Professionals, Fort Lauderdale Tax Council, Broward College, Nova Southeastern University, Lynn University, City of Miami, City of Miami Police Department, West Broward Estate Planning Council,

Rotary Leadership Institute, Probate and Pumpnickel Lecture Series sponsored by BNY Mellon and Palm Beach Atlantic University, and International Society for Performance Improvement (San Antonio, 2015).

National Business Institute:

1. Estate, Financial and Health Care Planning for Elder Care Clients in Florida, October 2002
2. Estate Drafting Checklists for the Estate Planning Paralegal, March 2003
3. Basic Estate Planning Administration, December 2003
4. Legislative Drafting Tips for Paralegals, Pleadings, Motion and Briefs, February 2009
5. The Probate Process From Start to Finish, December 2013
6. Tax Exempt Organizations From Start to Finish, June 2014
7. Drafting Effective Wills and Trusts, September 2014
8. Tax Exempt Organizations From Start to Finish, December 2014
9. Probate Boot Camp, December 2015
10. Estate Administration From Start to Finish, May 2019

EXPERIENCE:

Revis, Hervas & Goldberg P.A. May 2002-Present
Weston, Florida
Founder and Shareholder

Florida State University April 2017-Present
College of Business
Adjunct Professor teaching:
Law of Exempt Organizations

University Of Miami August 2016-Present
Miami, Florida
Adjunct Law Professor teaching:
Introduction to Probate and Estate Planning

Nova Southeastern University August 1998-Present
Fort Lauderdale, Florida
Adjunct Law Professor teaching:
Estate Planning Workshop, Estate & Gift Tax, Will Drafting Workshop (developed and gained school/faculty approval for this class which was added in 2010), Legal Drafting, Advanced Legal Research & Writing III & IV, Probate Workshop, Charitable Organizations Workshop, Advanced Legal Analysis/FBE - Wills, Trusts and Administration

Law Offices of Norman D. Kaplan, P.A. April 1996-May 2002
Sunrise, Florida
Senior Associate Attorney

Internal Revenue Service District Counsel January 1995-July 1995
Sunrise, Florida
Legal Intern / Legal Extern

PROFESSIONAL ORGANIZATIONS:

Tax Section, Florida Bar (Chairman, Exempt Organizations Committee)
Real Estate, Probate and Trust Section, Florida Bar
Public Interest Law Section, Florida Bar
Broward County Bar Association (Past Chairman, Tax Section)
Greater Fort Lauderdale Tax Council (Past President)
West Broward Estate Planning Council (Past President)
Broward County Planned Giving Council (Past President)
Nova Southeastern University Planned Giving Council (Past President)
Florida Bar Law Related Education Committee (6 years)
Florida Bar Committee on Relations with CPAs and the FICPA
Florida Bar Committee on Prepaid Legal Plans (3 years)

COMMUNITY INVOLVEMENT:

American Lung Association (National Board member from 2006-2012)
American Lung Association of the Southeast (Executive Board member)
American Friends of Red Magen David
Broward County School Board Academy of Finance
Advisory Board (Past Chairman)
Leadership Broward, Class of XXII
Hospice of Southeast Florida
Impact Broward (f/k/a Senior Volunteers and Broward Grandparents)
Broward General Hospital
Holy Cross Hospital
Bar-Ilan University
Technion University, Israel Institute of Technology
Weston/Pembroke Pines/Ft. Lauderdale Chamber of Commerce
Broward Community Foundation Professional Advisory Council
Broward College
Rotary Club of Weston and Rotary Club of Weston Charitable Foundation
Board Member, Jewish Community Foundation of Broward
Finance Committee, St. Bonaventure Catholic Church
Board Member, Archdiocese of Miami Estate Planning Council
President, Patio Homes of Weston (2021/2022)

SOCIAL INVOLVEMENT:

Nova Southeastern University Alumni Association
Nova Southeastern University Intermural Softball League
Fort Lauderdale Sigma Chi Alumni Association (Past President)
University of Miami Alumni Association
University of South Florida Alumni Association
Y.M.C.A. of Weston (2010 to 2015)
Weston Hills Country Club, Member (2015 to the present)