

## David E. Bowers

### Shareholder & Board Member

Florida Bar Board Certified  
Tax Attorney

### Contact

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561 650 0451

### Location

505 South Flagler Drive  
Suite 1100  
West Palm Beach  
Florida 33401

### Education

LL.M., University of Florida  
J.D., Ohio Northern University  
B.A., Olivet College, *cum laude*

### Admissions

The Florida Bar  
U.S. Tax Court



Shareholder David Bowers, a Jones Foster Board Member and Chair of the firm's Private Wealth, Wills, Trusts & Estates and Corporate & Tax Practice Groups, has over 30 years of experience in complex tax, trusts and estates, and business planning. David is a Florida Bar Board Certified Specialist in Tax and has extensive experience in estate planning, estate and trust administration, including IRS audits and business transactions.

David has a unique ability to take complex tax concepts and make them understandable. He leverages his knowledge to develop practical solutions for his clients, many of whom he has developed decades-long relationships with as a trusted legal advisor in all aspects of their individual family, and business needs.

David has held leadership roles in several industry organizations. He is a past chair of the Florida Tax Institute and currently an operating board member. He also is a past chair of The Florida Bar's Tax Section, The Florida Bar's Tax Law Certification Committee, and the Palm Beach Tax Institute.

David is consistently selected by his peers for inclusion in *The Best Lawyers in America*, *Florida Super Lawyers*, and *Palm Beach Illustrated's* "Top Lawyers", and was awarded the Gerald T. Hart Outstanding Florida Tax Attorney of the Year Award in 2016 by The Florida Bar in recognition of his major contributions to the advancement of the practice of tax law and commitment to the highest standards of competence and integrity.

### Experience Highlights

**Multi-Generational Family Corporation Dispute and Reorganization**



Representation of a large, multi-generational family corporation in a family dispute, resulting in redemption of family shareholders and establishing a tax-free reorganization to shift the disputing family members into separate organizations.

#### **Estate Tax Return Audits**

Representation of numerous estates in connection with audits of their estate tax returns and settlement of complex issues regarding partnerships, limited liability companies, and applicable discounts.

#### **Sale of Physician Groups to Publicly Traded Companies**

Representation of numerous physician groups in the sale of their practices to publicly traded companies and hospitals.

#### **Corporate Contracts for Medical Groups**

Representation of numerous medical groups in connection with employment, outsourcing, and vendor contracts with hospitals and medical personnel, including radiologists, pathologists, and emergency room physicians.

#### **Manufacturing Firm Allocation of Purchase Price to Intellectual Property**

Representation of a large, out-of-state family manufacturing firm acquired by a publicly traded corporation involving allocation of purchase price to goodwill and intellectual property.

#### **Estate Tax Planning to Protect Retirement Funds**

Representation of numerous clients with large retirement plan accumulations; plan for the distribution of retirement assets to minimize taxes and increase creditor protection for their children and grandchildren.

#### **Acquisition of a \$15 Million Car Dealership**

Representation in the acquisition of a \$15 million South Florida car dealership that involved complex tax allocation and real estate issues.

#### **Estate Tax Consequences for Beneficiaries of Non-U.S. Citizen**

Representation of beneficiaries of a non-U.S. citizen's domestic estate involving cross-border tax consequences, including foreign trust issues.

#### **Honors & Distinctions**

##### **The Best Lawyers in America**

Corporate Law, 2023-Present

Trusts & Estates, 2007-Present

Tax Law, 1999-Present

Employee Benefits (ERISA) Law, 1995-Present



Lawyer of the Year, West Palm Beach, Tax, 2014

#### **Florida Super Lawyers**

Business/Corporate, 2006-Present

#### **Palm Beach Illustrated**

Top Lawyers, Business/Corporate, 2023-Present

Top Lawyers, Corporate Law, 2024

Top Lawyers, Employee Benefits Law, 2024

Top Lawyers, Tax Law, 2018, 2020-Present

Top Lawyers, Trust & Estates, 2018, 2021-2022

Top Lawyers, Labor & Employment Law, 2019

#### **The Florida Bar Tax Section**

Gerald T. Hart Outstanding Florida Tax Attorney of the Year, 2016-2017

#### **South Florida Legal Guide**

Top Lawyers, 2010, 2015, 2016, 2017

#### **Florida Trend**

Legal Elite, Tax Law, 2013, 2022

#### **Martindale-Hubbell, AV® Peer Review Rated**

#### **Distinguished Alumni Award Recipient**

Olivet College, 2022

### **Affiliations**

#### **Florida Tax Institute**

Operating Board Member, 2014-Present

Past Chair, Operating Board

#### **The Florida Bar Tax Section**

Member, Executive Council, Present

Chair, Employee Benefits Subcommittee of the Taxation of Business Organizations/Individuals Committee, Present

Co-Chair, Law College Scholarship Committee, Present

LL.M. Liaison to the University of Florida, Present

Member, Long Range Planning Committee, Present

Chair, 1999-2000

Chair, Tax Law Certification Committee, 1999-2000

Member, Tax Law Certification Committee, 1992-2002

Member, 1984-Present

#### **Palm Beach Tax Institute**

Past President

#### **East Coast Estate Planning Council**

Member, 2019-Present



**University of Florida Law Center Association**

Florida Alumni Tax Advisory Committee, Chair 2018-Present  
Florida Alumni Tax Advisory Committee, Member, 2016-Present  
Board of Trustees, 2012-2017

**Rehabilitation Center for Children and Adults**

Professional Endowment Committee, Chairman, 2018-Present

**Dreyfoos School of the Arts Foundation**

Board Member, 2002-2006

**Palm Beach County Fringe Benefit Council**

President, 1986-1989

