ROBERT S. KEEBLERCPA, MST, AEP (Distinguished)

Robert S. Keebler, CPA/PFS, MST, AEP (Distinguished) is a partner with Keebler & Associates, LLP and is a 2007 recipient of the prestigious Accredited Estate Planners (Distinguished) award from the National Association of Estate Planners & Councils. He has been named by CPA Magazine as one of the *Top 100 Most Influential Practitioners in the United States* and one of the *Top 40 Tax Advisors to Know During a Recession*. Mr. Keebler is the past Editor-in-Chief of CCH's magazine, *Journal of Retirement Planning,* and a member of CCH's Financial and Estate Planning Advisory Board. His practice includes family wealth transfer and preservation planning, charitable giving, retirement distribution planning, and estate administration. Mr. Keebler frequently represents clients before the National Office of the Internal Revenue Service (IRS) in the private letter ruling process and in estate, gift and income tax examinations and appeals.

In the past 20 years, he has received over 250 favorable private letter rulings including several key rulings of "first impression." Mr. Keebler is nationally recognized as an expert in estate and retirement planning and works collaboratively with other experts on academic reviews and papers, and client matters. Mr. Keebler is the author of over 75 articles and columns and editor, author, or co-author of many books and treatises on wealth transfer and taxation, including the Warren, Gorham & Lamont of RIA treatise Esperti, Peterson and Keebler/Irrevocable Trusts: Analysis with Forms.

Mr. Keebler served as the Chair of the AICPA's Advanced Estate Planning Conference from 2014-2020 and continues to serve on the planning committee. He is a featured columnist for CCH's *Taxes Magazine* – "Family Tax Planning Forum," Steve Leimberg's "News of the Week Newsletter" and the Bureau of National Affairs Tax Division. Bob is also a contributing author to the American Bar Association's *The ABA Practical Guide to Estate Planning.* Bob frequently is quoted in national publications such as *The Wall Street Journal, New York Times, Chicago Tribune, Baltimore Sun, Barrons, Bloomberg Wealth Manager, Financial Advisor*, *Forbes*, *Kiplinger*, *Lawyer's Weekly*, *On Wall Street, USA Today, Wealth Manager* and *Worth* in addition to many local and regional newspapers.

Mr. Keebler is a frequent speaker for legal, accounting, insurance and financial planning groups throughout the United States at seminars and conferences on advanced IRA distribution strategies, estate planning and trust administration topics including the AICPA's Advanced Estate Planning, Personal Financial Planning Conference and Tax Strategies for the High Income Individual Conference, the Heckerling Institute on Estate Planning and the Notre Dame Tax & Estate Planning Institute. Mr. Keebler received an award from CPAacademy for Top Presenter 2022. This award honors those who are committed to the education of accounting professionals and shares their knowledge in an open and easily accessible format. He also received an award for Top Tax Educator of the Year for 2021-22 from myCPE for outstanding contributions in the field of tax education and exceptional dedication to the field.

Mr. Keebler graduated (cum laude) from Lakeland College with a degree in Accountancy and the University of Wisconsin - Milwaukee with a Masters in Taxation. Before practicing in Northeastern Wisconsin, he practiced with Price Waterhouse where he concentrated in taxation.

Connect with Robert S. Keebler, CPA, MST, AEP (Distinguished) at:
Robert.Keebler@KeeblerandAssociates.com

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