

# Jo Ann M. Koontz

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(941) 225-2615

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Attorney and Certified Public Accountant with professional experience in the areas of accounting, business, and law; assisting clients with business formations, real estate and title transactions, and taxation matters.

## Practice Areas

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- Real Estate Law
- Title Insurance
- Business Law
- LLC and Corporate Formations
- Taxation Law
- Representation before IRS

## Professional Experience

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- Koontz & Associates, PL**, Sarasota, Florida 2011 – Present  
**Koontz & Parkin, CPAs**, Sarasota, Florida  
Principal Attorney and CPA  
Founded firm in 2011 upon recognizing the need for a combined law and CPA firm. Counsel clients regarding real estate, business and tax laws. Handle business asset and stock sales for US and foreign clients. Represent clients before the IRS and Florida Department of Revenue. Formed Koontz & Parkin, CPAs to offer clients tax planning and income tax preparation services.
- Yesner & Boss, PL**, Attorneys at Law, Tampa, Florida 2010 -- 2011  
Managing Attorney for the Sarasota office  
Law firm focused upon residential and commercial real estate closings, real estate litigation, foreclosure defense and short sales. Firm also offered a full range of legal services, including civil litigation, bankruptcies, business law, family law, personal injury, wills, trusts and probate.
- Icard, Merrill, Cullis, Timm, Furen & Ginsburg, P.A.**, Attorneys at Law, Sarasota, Florida 2005 -- 2010  
Associate Attorney  
Worked with senior partners to provide skilled and experienced legal counsel in all aspects of real property matters. Managed real estate transactions, business, and tax matters.
- Sheila Boettger & Associates, CPAs**, Lima, Ohio 2004 -- 2005  
Staff Accountant
- Rea & Associates, CPAs**, Lima, Ohio 1998 -- 2005  
Staff Accountant

## Professional Certification

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- 2007 Admitted to the **United States Tax Court**
- 2007 Admitted to the **Middle District of Florida United States District Court**
- 2006 Admitted to the **Florida Bar**
- 2006 Florida licensed **Certified Public Accountant**
- 2003 Ohio licensed **Certified Public Accountant**

## Education

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<b>Ohio Northern University, Pettit College of Law</b> , Ada, Ohio Juris Doctor, American Jurisprudence Book Award	2003 -- 2006
<b>Ohio Northern University</b> , Ada, Ohio Bachelor of Science in Business Administration, Major: Accounting; Concentration: Pre-Law	1997 -- 2001

## Professional Affiliations

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- **The Florida Bar:** Member; Real Property, Probate and Trust Law Section, Tax Law, and Business Law Sections
- **American Bar Association:** Member; Real Property, Probate and Trust Law Section
- **Sarasota County Bar Association:** Member
- **Sarasota County Bar Association:** Real Property Section Co-Chairman
- **Sarasota Board of Realtors:** Affiliate Member
- **Women's Council of Realtors:** Affiliate Member
- **Realtor Attorney Joint Committee:** Member, Article Writer
- **American Association of Attorney-CPAs:** National Board Secretary and IRS Liaison Committee

## Community Service

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<b>The Glasser Schoenbaum Human Services Center</b> , Sarasota, Florida Advisor to an innovative enterprise bringing an objective and collaborative entrepreneur platform to more traditional economic development circles. BarCamp Guest Instructor.	2014
<b>Spark Growth, Business Incubator Project</b> , Bradenton, Florida Advisor to an innovative enterprise bringing an objective and collaborative entrepreneur platform to more traditional economic development circles. BarCamp Guest Instructor.	2013 - Present
<b>Human Services Advisory Council</b> , Sarasota, Florida Council Member for the organization that provides a conduit for citizen input to the County Commissioners regarding contracted human services; provide advice and recommendations to the commissioners on Human Services policy.	2012 - Present
<b>Center for Autism Resources and Education</b> , Sarasota, Florida Board member for this non-profit that provides continued education, professional training, resources, and related support to parents, professionals, and other caregivers.	2008 - 2011
<b>Community Housing Trust</b> , Sarasota, Florida CHT is a non-profit organization working with Sarasota County Government to create permanently affordable housing opportunities for low and moderate income families in Sarasota.	2007 - 2009
<b>Volunteer Income Tax Assistance program (VITA)</b> , Ada, Ohio The VITA Program offers free tax help for low to moderate income people who cannot prepare their own tax returns. As a certified student volunteer received training to help prepare basic tax returns.	1998 -- 2006

## Speaking Engagements

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- Paralegals Association Florida – Topic: Identity Theft: Find It, Face It, Fix It & Fend It Off! 2015
- A Place In The Sun – Live (United Kingdom)  
Topics: How Property Owners Can Best Structure Their Business From a Legal

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| and Tax Perspective, Title Insurance, Real Estate Investment Risks & Rewards  | 2014-present    |
| <input type="checkbox"/> Palm Beach Atlantic University – Probate and Pumpnickel Series<br>Topics: How Business Owners Can Best Structure Their Business From a Legal and Tax Perspective   | 2014-present    |
| <input type="checkbox"/> Florida Realtors Annual Convention –<br>Topics: How Real Estate Professionals Can Best Structure Their Business From a Legal and Tax Perspective; Title Insurance 101 – Know the Basics                                | 2014            |
| <input type="checkbox"/> Host of It’s Your Business – With Jo Ann Koontz, business and real estate talk radio show  | 2014-present    |
| <input type="checkbox"/> Southwest Florida Paralegals Association –<br>Topic: Identity Theft: Find It, Face It, Fix It & Fend It Off!   | 2014            |
| <input type="checkbox"/> Suncoast Crime Prevention Association – The association encompasses a nine county area around Tampa Bay which represents 35 Law Enforcement agencies<br>Topic: Identity Theft: Find It, Face It, Fix It & Fend It Off! | 2014            |
| <input type="checkbox"/> Continuing Legal Education Presenter for the Real Property Section of the Sarasota County Bar Association<br>Topic: Foreclosure Update   | 2013            |
| <input type="checkbox"/> Florida Financial Planners Association and the Florida Institute of CPAs Joint Meeting,<br>Topic: Cancellation of Debt   | 2012            |
| <input type="checkbox"/> National Convention of the AAA-CPAs, Topic: Cancellation of Debt   | 2012            |
| <input type="checkbox"/> Women’s Resource Center, Topic: Business Formation and Taxation  | 2012 – present  |
| <input type="checkbox"/> BarCamp Guest Instructor, Topic: Business Formation and Taxation   | 2012 – present  |
| <input type="checkbox"/> Women’s Council of Realtors, Topics: Real Estate, Short Sales, Foreclosures  | 2010 -- present |
| <input type="checkbox"/> Guest speaker for Talk Credit Radio Show   | 2010 – 2012     |
| <input type="checkbox"/> Guest speaker for Gail Shane & Friends Real Estate Radio Show  | 2010 – 2012     |
| <input type="checkbox"/> Sarasota Association of Realtors and Manatee Association of Realtors,<br>Topics: Real Estate, FIRPTA, Business, Tax  | 2009 -- present |