



## Bea Rosenberg, CPA

Bea is a **Director** with Deming, Malone, Livesay & Ostroff (DMLO). She is the Chair of the Wealth Advisory Niche.

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## Experience

Bea joined the firm in January 1998 to specialize in estate planning, estate & gift tax, and fiduciary & individual income tax. She devoted over 15 years prior to that developing expertise in this field within the tax departments of two local trust companies.

## Education and Certifications

Bea earned both a Bachelors in Accounting and Masters of Business Administration from the University of Louisville, and is licensed to practice as a CPA. Bea is a graduate of Focus Louisville and Leadership Louisville (2010).

## Professional Memberships and Activities

Professional memberships include the American Institute of Certified Public Accountants and the Kentucky Society of Certified Public Accountants. Bea is a member of the Estate Planning Council of Metro Louisville, the University of Louisville Planned Giving Advisory Council, and the National Association of Women Business Owners (NAWBO).

## Awards and Recognition

Bea is a recipient of the Wilson Wyatt Award for Excellence in Professional Advising.

## Writing/Speaking Engagements

University of Kentucky College of Law – Mid South Estate Planning Conference  
University of Louisville Louis A. Grief Tax Planning Institute  
University of Louisville Annual Estate Planning Institute  
Estate Planning Council of Metro Louisville  
Louisville Bar Association Probate Section  
Lorman Educational Services  
Professional Education System, Inc. (PESI) on Fiduciary Income Taxation

## Community Involvement

Bea serves as Treasurer for both the Board of Trustees of River Fields, Inc. and for the Center for Interfaith Relations.

### DMLO Locations:

9300 Shelbyville Rd., Ste. 1100, Louisville, KY 40222 | [502.426.9660](tel:502.426.9660)

301. E. Elm St., New Albany, IN 47150 | [812.945.5236](tel:812.945.5236)

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