

JONATHAN H. ELLIS

BIOGRAPHICAL DATA

Jonathan H. Ellis, J.D., LL.M. (Taxation)

B.S. in Accounting from the Pennsylvania State University

J. D. from Widener University

LL.M. (Taxation) from Temple University

Mr. Ellis is currently a Shareholder in the law firm of Plotnick & Ellis, P.C., where his practice focuses primarily on estate planning, estate administration, elder law, and the representation of closely held businesses.

He has a B.S. in Accounting from Pennsylvania State University, J.D. from Widener University, and LL.M. (Taxation) from Temple University. In addition, Mr. Ellis is Executive Editor and Co-author, and along with Stephen Leimberg, et.al., of Tools and Techniques of Estate Planning, 16th Edition, The National Underwriter Company, as well as a Co-Author of the 15th Edition. Also, Mr. Ellis is the author of the book “Drafting Wills and Trusts in Pennsylvania”, 2010 Edition for PBI Press. Mr. Ellis is also a member of the Editorial Advisory Board for Tax Facts 2012 and 2013, The National Underwriter Company. In addition, he is the author of 30 articles for Pennsylvania Tax Service Insights (LexisNexis Matthew Bender). Finally, he is a former member of the Adjunct Faculty at Villanova Law School where he taught Family Wealth Planning.

Mr. Ellis frequently speaks to a variety of groups, including attorneys, accountants and financial planners throughout Pennsylvania, New Jersey, Delaware and Maryland. Mr. Ellis is also the Course Planner for the PBI Courses “Drafting Wills and Trusts in Pennsylvania”, “Wills v. Trusts: A Primer on the Right Tool for Your Clients”, “Use of Trusts”, and “Post-Mortem Estate Planning”, and a participant in a variety of additional courses for PBI. He is also an annual participant in the Villanova University’s annual tax conference, co-sponsored with the Internal Revenue Service.

He is a member of the Pennsylvania, New Jersey and Florida Bars; the Montgomery County Bar Association; and the Philadelphia Estate Planning Council. Mr. Ellis is also a Fellow of the American College of Trust and Estate Counsel.