

January 2018

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CERTIFICATIONS & ASSOCIATIONS:

- Attorney and Counselor at Law Washington State Bar
- Member, Washington State Bar Association
- Former Member, North Texas Estate Planning Council
- Former Member, Dallas Estate Planning Council
- Member, Denver Estate Planning Council
- Licensed to Practice in all courts of Washington State
- Certified Financial Planner

EDUCATION:

- **LLM Taxation;** University of Washington, Seattle, WA 2002
- **Cannon Trust School Graduate;** Cannon Financial Institute 2001
- **Juris Doctorate;** J. Reuben Clark Law School, Brigham Young University, Provo, UT 1999
 - o Graduated with Honors
 - o Associate Editor of the Journal of Public Law
- **Bachelor of Science, Finance;** University of Utah, Salt Lake City, UT 1988
 - o Named to the National Dean's List & Recipient of Scholastic Achievement Award.

PROFESSIONAL EXPERIENCE:

- **Director of Wealth Impact Planning;** *Ascent Private Capital Management of US Bank, - Denver, CO*
- **Vice President & Associate Wealth Strategist;** *US Trust, Bank of America, – Dallas, TX*
- **Vice President & Senior Trust Officer;** *Bank of America – Seattle, WA & Dallas, TX*
- **Adjunct Professor;** College of Business, Central Washington University, Ellensburg, WA
 - o Taught individual & business income taxation
- **Research Associate & Assistant Editor;** Law.Com, Phoenix, AZ
- **Legal Research Assistant;** Will Aitckinson P.S., Inc., Portland, OR
- **Independent Accounting Consultant;** McGraw Inc., Preston, WA
- **Controller;** Oliphant Research International, Inc., Salt Lake City, UT
- **Cost Accountant;** Boeing, Seattle WA

ARTICLES AUTHORED:

Does the Glass Slipper Fit? August 2016
Help With Domestic Help, Dec 2015
A Powerful Tax Strategy Worth A Second Look, Aug 15, 2014
Seven Keys To A Better Beneficiary-Trustee Relationship, June 5, 2014
Live Long and Prosper: Creating Trusts With Heart & Soul, September 24, 2013
Foundations: Unifying Families Across Generations, January 25, 2013
Who's Your Granddaddy?, October 5, 2012

COMMUNITY SERVICE:

- Scoutmaster – 12 & 13 year old boys
- Scout Leader for 11 year old Scout Patrol
- Volunteer – “Relay for Life”
- Volunteer – Dallas Legal Clinic