News, Events & Publications

David Berek

Publications

- Author, "Federal Income Taxation of Decedents, Estates and Trusts," Wolters Kluwer CCH, 2019
- Author, "Illinois Estate Planning, Will Drafting and Estate Administration Forms," *LexisNexis 4th ed.*, 2009-2019
- Author, "Federal Income Taxation of Decedents, Estates and Trusts," *Wolters Kluwer CCH*, 2013-2016
- Contributor, "Bloomberg BNA 2016 Trust Nexus Survey: Covering Location of Trust Administration, Domicile/Residency of the Trustor, Domicile/Residency of the Trustee, Domicile/Residency of the Beneficiary and Trust Situs," *Tax Management Multistate Tax Report*, 23 September 2016
- Author, "Legal and Tax Structures in Organizing or Restructuring a Single Family Office," *Family Office Association*, January 2016
- Contributor, "Bloomberg BNA 2015 Trust Nexus Survey: Trust Nexus Survey Analysis Of Key Factors Driving State Taxation Of Trusts," *Tax Management Multistate Tax Report*, 25 September 2015
- Author, "Fiduciary Income Taxation," *TAXES*, Vol. 92, No. 12, December 2014
- Author, "Estate Planning for 2012: Looming Lower Gift Tax Exclusion Limits," *Illinois Bar Journal*, Vol. 100, February 2012
- Author, "Death and Taxes," *Modern Metals Magazine*, May 2011
- Co-editor, "Circuit Court Probate Division," Chapter 7, *Chicago Lawyers Handbook* 2007 and 2010
- Author, "Waiver of Minimum Required Distributions for 2009 and Other Developments," *Illinois Bar Journal*, February 2009
- Author, "Engagement Letters, Fees and the Dowling Case," *Illinois Bar Journal*, May 2008
- Author, "Prepare Yourself: New Preparer Standards for Estate and Gift Tax Returns," *Illinois Bar Journal*, February 2008

- Author, "Year-End Planning for Trust-and-Estate Clients," *Illinois Bar Journal*, November 2007

- Author, "What's Great about GRATs," *Illinois Bar Journal*, August 2007

- Author, "Fees for Investment Management: What Percentage is Deductible by Estates and Trusts?," *The Journal of Taxation*, May 2007

- Author, "Are Investment Advisory Fees 100 Percent Deductible?," *Illinois Bar Journal*, February 2007

- Author, "New Pension Protection Act a Boon to Charitable Giving," *Illinois Bar Journal*, November 2006

- Author, "Private Trust Companies: A New Trend with Family Offices," *The Portfolio Journal*, Vol. 3, 2006

- Author, "Estate Planning with the Increasing Exclusion Amount," *Illinois Bar Journal*, August 2006

- Author, "Legislation Would Reduce Confusion for Health Care, Property POA Agents," *Illinois Bar Journal*, May 2006

- Author, "Higher Exclusion Limit Presents New Planning Opportunities for Gifts to Minors," *Illinois Bar Journal*, February 2006

- Author, "Three New Illinois Law Affect Estate Planning Practice," *Illinois Bar Journal*, November 2005

- David Berek interviewed for "Finding Common Flaws in Estate Plans" by Nancy Opiela, *Journal of Financial Planning*, October 2005

- Author, "*Strangi* IV Fails the 'Bona Fide' Sale Exception Under Code Sec. 2036 for Want of Substantial Business and Other Non-Tax Purpose," *Journal of Practical Estate Planning*, August/September 2005 (reprinted in the Journal of Retirement Planning, September/October 2005)

- Author, "Taxes and Marital QTIP Trusts: The Impact of an Anti-Apportionment Clause," *Illinois Bar Journal*, August 2005

- Author, "Illinois Modifies Illinois Estate Tax to Apportion the State Death Tax Credit Amount Among Other States with Tax Situs Real Estate," I*SBA Trusts & Estates Newsletter*, July 2005

- Author, "*Strangi* Strikes Again - The Fifth Circuit Finds in Favor of Service, Assets Transferred to Family Limited Partnership Included in Decedent's Estate," *ISBA Trusts & Estates Newsletter*, July 2005

- Author, "The Section 2036 and Retained Interests Trifecta: *Bongard*, *Bigelow* and *Ehmann*," *ISBA Trusts & Estates Newsletter*, July 2005

- Author, "Estate Administration Alternative for Financing the Payment of the Estate Tax: The Use of a *Graegin* Note and Section 2053," *ISBA Trusts & Estates Newsletter*, July 2005

- Author, "Is the Family LLC Still a Good Asset Protection Device?" *Illinois Bar Journal*, May 2005

- Author, "Business Succession Planning and Buy-Sell Agreements: Lessons from *True*, *Blount* and *Smith*," *Illinois Bar Journal*, February 2005

- Author, "Recent Decisions Indicate a Review of Tax Apportionment Clauses," *Estate Planning*, January 2005

- Co-author, "Annual Report: Important Developments During the Year in Estate and Gift Tax," *The Tax Lawyer* Vol. 58, No. 4, Summer 2005

- Author, "Annual Report: Important Developments During the Year in Estate and Gift Tax," *The Tax Lawyer* Vol. 57, No. 4., Summer 2004

- Author, "New Small Estate, Anti-Lapse, Health POA Provisions," *Illinois Bar Journal*, November 2004

- Co-author, "*Blount* and *Smith* Provide Guidance on Buy Sell Agreements: Restrictions Disregarded Under Section 2703 for Valuation Purposes When Safe Harbor Requirements are Not Met," *ISBA Trusts & Estates Newsletter*, December 2004

- Co-author, "Interstate Transfer Does Not Satisfy 'Otherwise Given' for Purposes of Stock Purchase Agreement," *ISBA Trusts & Estates Newsletter*, December 2004

- Co-author, "Recent Developments in Estate Planning and Administration," *Journal of Taxation of Investments*, Summer 2004

- Author, "Illinois' New Estate-Tax Law," *Illinois Bar Journal*, September 2003

- Author, "Illinois Amends the Estate Tax to Offset EGTRRA Reductions in the State Death Tax Credit," *ISBA Trusts & Estates Newsletter*, August 2003

- Author, "Educational Expenses in Illinois: An Analysis of Section 529 Plans in Illinois after EGTRRA," *ISBA Trusts & Estates Newsletter*, December 2001

- Author, "Recent Developments Regarding Property Powers of Attorney in Illinois," *CBA Record*, May 2001

- Author, "The Nuts and Bolts of Health Care Powers of Attorney," *CBA Record*, May 2000

- Author, "Estate, Gift and GST Tax Reform: The Tax Refund and Relief Act of 1999," *ISBA Trusts & Estates Newsletter*, September 1999

- Author, "Assets or Stock on the Block: Negotiating Between the Parties Can Minimize Tax Impact," *ABA Journal*, July 1999

- Author, "ERISA Preemption of Welfare Plan Designations: Now is the Time for Legislation to Aid the Family Lawyer with a New Welfare Plan QDRO," *Family Law Quarterly*, Fall 1998

- Author, "Tax Rulings Underscore Role of Time Records," *Chicago Daily Law Bulletin*, July 1998

Presentations

- Co-presenter, "The Proposed 2704 Regulations and Valuation: What do We Do Now that Trump has been Elected?," *Baker & McKenzie Chicago, Breakfast Briefing*, 10 November 2016

- Presenter, "State Income Taxation of Trusts: Understand the Significance of State Residency for Fiduciary Income Tax Purposes, the State Fiduciary Income Taxation Rules and the Impact of the Recent Linn Decision," *42nd Annual Notre Dame Tax and Estate Planning Institute*, 28 October 2016

- Co-presenter, "Fast-Paced Overview of Global Developments – United States,"*17th Annual International Tax & Trust Training Program*, Miami, Florida, 27 October 2016

- Co-presenter, "All in the Family: The Proposed 2704 Regulations and Valuation Discounts," *Baker & McKenzie New York, Breakfast Briefing*, 13 October 2016

- Co-presenter, "2016 Trust Nexus Survey Webinar: Learning from the Trust Nexus Survey," *Bloomberg BNA National Webinar*, 4 October 2016

- Speaker, "Grantor Trust Income Tax Reporting Alternatives," *ABA Tax Section Meeting*, American Bar Association, Fiduciary Income Tax Committee, Washington, DC, 7 May 2016

- Speaker, "Trust Income Tax at the State Level: The Significance of State Residency for Trust Fiduciary Income Tax Purposes," *Wolters Kluwer / CCH National Webinar*, 16 March 2016

- Speaker, "Planning to Avoid Estate Contests," *RMB Capital Advisor Conference*, Chicago, Illinois, 18 February 2016

- Speaker, "Understanding Family Offices: Purpose, Administration, and Structure," *Wolters Kluwer / CCH national webinar*, 14 December 2015

- Speaker, "Trust Situs: State Income Taxation of Trusts," DuPage Estate Planning Council, Oak Brook, Illinois, 4 November 2015

- Speaker, "Income Tax Deductions under 642(c) for Charitable Bequests of IRD," *ABA Tax Section Meeting*, 19 September 2015

- Speaker, "Trust Income Tax at the State Level: The Significance of State Residency for Trust Fiduciary Income Tax Purposes," *Wolters Kluwer / CCH national webinar*, 17 September 2015

- Speaker, "Planning for New Basis at Death," Whitnell Family Office Tax Seminar, Oak Brook, Illinois, 18 July 2015

- Speaker, "Linn & Changing Trust Residence," Illinois Institute for Continuing Legal Education, Estate Planning Short Course, Chicago, Illinois, 19 May 2015

- Speaker, "State Fiduciary Law Update – Nevada Incomplete Non-Grantor Gift Trusts," American Bar Association, Fiduciary Income Tax Committee, Washington, DC, 9 May 2015

- Speaker, "Tax Apportionment in Estate Planning: Drafting Clauses to Preserve Dispositive Provisions," Strafford Publications, national webinar, 20 January 2015

- Speaker, "Section 469 Regulations: Update on the Committee's Comment Writing Task Force," American Bar Association, Fiduciary Income Tax Committee, Houston, Texas, 31 January 2015

- Speaker, "Fiduciary, Estate and Gift Tax Update: ATRA, Section 67(e) Un-Bundling, *Aragona* and Passive Losses," Illinois CPA Society, *2014 Estate and Gift Tax Conference*, Chicago, Illinois, 12 November 2014

- Speaker, "The Art of Selecting the "Right" Wealth Manager – Attorney Selection," North County Estate Planning Council, San Diego, California, 7 October 2014

- Speaker, "*Frank Aragona Trust v. Commissioner* and Material Participation of Estates and Trusts for Passive Activities," American Bar Association, Fiduciary Income Tax Committee, Denver, Colorado, 19 September 2014

- Speaker, "To Reveal or Conceal? The Transparency Myth in Families of Wealth and Family Businesses," Family Firm Institute, Chicago, Illinois, 19 June 2014

- Speaker, "Maximizing Your Legacy: Year-end Charitable Strategies," DePaul University, *Master of Science in Wealth Management Dedicated Seminar Series*, Chicago, Illinois, 3 December 2013

- Speaker, "Fiduciary Income Tax Fundamentals," Illinois State Bar Association, *Estate Administration Boot Camp*, Chicago, Illinois, 25 October 2013

- Speaker, "The Transparency Myth in Family Enterprises: The Big Reveal or Less is More," Family Firm Institute, San Diego, California,17 October 2013

- Speaker, "Trusts Used For Tax Reduction," *National Business Institute Seminar*, Chicago, Illinois, 9 August 2013

- Speaker, "Grantor Trusts," *National Business Institute Seminar*, Naperville, Illinois, 8 August 2013

- Speaker, "Family Communications: How to Talk About the Good, the Bad and the Ugly," Family Office Review, *2nd Annual Family Office Review FOR Awards*, Chicago, Illinois, 5 June 2013

- Speaker, "Fiduciary Income Tax Strategies and Background," Illinois CPA Society, *2013 Estate and Gift Tax Conference*, Chicago, Illinois, 9 May 2013

- Speaker, "Ethics in Estate Planning: Issues Raised When Attorneys are Asked to Serve as Fiduciaries for Clients,"*Estate Planning Short Course*, Illinois Institute for Continuing Legal Education, Champaign, Illinois, 3 May 2013

- Speaker, "Ethics in Estate Planning: Issues Raised When Attorneys are Asked to Serve as Fiduciaries for Clients," Estate Planning Short Course, Illinois Institute for Continuing Legal Education in Chicago, Illinois, 24 April 2013

- Speaker, "Building the Family Experience: Engage and Create Conversations," Inheriting Wisdom, and, the Family Office Review, Chicago, Illinois, 3-4 March 2013

- Speaker, "Estate and Gift Tax Update," Northwest Suburban Estate Planning Council, Arlington Heights, Illinois, 21 February 2013

- Speaker, "After the Fiscal Cliff: Roller Coaster or Merry Go Round? Addressing Income and Transfer Tax Issues," Illinois State Bar Association, W*ebinar for the Studio Webcast Law Education Program*, 5 February 2013

- Speaker, "Recent Developments Affecting the Income Taxation of Trusts and Estates," American Bar Association, Fiduciary Income Tax Committee, Orlando, Florida, 26 January 2013

- Speaker, "The Future of Estate Tax," Lake County Bar Association, Annual Trust and Estate Conference, Lake Forest, Illinois, 16 November 2012

- Speaker, "Income Taxation of Trusts and Estates," National Business Institute, Tax Planning for Trusts and Estates, Chicago, Illinois, 19 September 2012

- Speaker, "Dealing with the Top 10+ Mistakes Found in Estate Plans," Illinois Institute for Continuing Legal Education, Neglected Estate & Tax Planning Issues, Chicago, Illinois 24 August 2012
- Speaker, "Interest Rate Sensitive Planning: Understanding the Value of Time," Chicago Estate Planning Council, Young Members Workshop, Chicago, Illinois, 12 June 2012
- Speaker, "A Primer on the Income Taxation of Trusts," The John Marshall Law School, Spring 2012 Tax Law and Employee Benefits Lunch, Chicago, Illinois, 21 March 2012
- Speaker, "Sophisticated Insurance and Retirement Funds Planning," National Business Institute, Cutting-Edge Asset Protection Skills and Techniques, Chicago, Illinois, 19 March 2012
- Speaker, "Ethical Issues for Trust and Estate Practitioners: An Overview of Circular 230 with Recent Updates," ABA Section of Taxation, Fiduciary Income Tax Committee, San Diego, California, 18 February 2012
- Speaker, "Tax Reform Project Update Affecting the Income Taxation of Trusts and Estates," ABA Section of Taxation, and, Real Property Trust & Estate Law Meeting, Denver, Colorado, 22 October 2011
- Speaker, "A Panel Discussion on Ethical Issues in Estate Planning,"ABA Section of Taxation, and, Real Property Trust & Estate Law Meeting, Denver, Colorado, 20 October 2011
- Speaker, "Complex Assets: The Most Overlooked Charitable Donations," Fidelity Charitable Conference, Chicago, Illinois, 12 October 2011
- Speaker, "Fiduciary Responsibility - Focused on Your Future," National Automobile Dealers Association Retirement Trust (NADART), Itasca, Illinois, 22 July 2011
- Speaker, "Focus on Estate Planning Structures: APTs, GRATs, IDGTs, FLLEs," Family Office Forum, Chicago, Illinois, 1 June 2011
- Speaker, "Ethical Warning Signs - Avoiding and Dealing with Difficult Clients," American Bar Association, Tax Practice Management Committee, Washington, DC, 7 May 2011
- Speaker, "Roth IRA Conversions: What the Estate Planning Attorney Needs to Know," *ALI-ABA national teleconference*, December 2010
- Speaker, "Navigating the Changing Landscape of Estate Planning," Illinois State Bar Association, Chicago, Illinois, December 2010
- Speaker, "Legislative Outlook for 2011," Northwest Suburban Bar Association, Palatine, Illinois, November 2010

- Speaker, "Roth IRA Conversions: What the Estate Planning Attorney Needs to Know," *ALI-ABA national teleconference*, September 2010

- Speaker, "Risks and Benefits of Roth Conversions," American Bar Association, Employee Benefits Executive Compensation Committee, Toronto, Canada, September 2010

- Speaker, "Roth Conversions – Recharacterizations," American Bar Association, Employee Benefits Distributions Committee, Washington, DC, May 2010

- Speaker, "Roth Conversions: Issues and Opportunities," *Knowledge Conference national webcast*, April 2010

- Speaker, "Risks and Opportunities for Private Trust Companies and Family Offices from State and Federal (Non-Tax) Legislative Developments and Proposals," American Bar Association, Fiduciary Income Tax Committee, San Antonio, Texas, January 2010

- Speaker, "Roth IRA Conversions: What the Estate Planning Attorney Needs to Know," *ALI-ABA national teleconference*, December 2009

- Speaker, "Legislative and Case Law Update," Chicago Bar Association, Chicago, Illinois, November 2009

- Speaker, "Legislative Outlook for 2009 and Ethical Developments," Northwest Suburban Bar Association, Palatine, Illinois, October 2009

- Speaker, "Distinguished Speaker Series - Working with Wealth Families," Financial Planning Association of Illinois, Chicago, Illinois, September 2009

- Speaker, "Roth Conversions and Other Aspects Dealing with Retirement Assets in the Estate Plan," Illinois Institute for Continuing Legal Education, Springfield, Illinois, May 2009

- Speaker, "Roth Conversions and Other Aspects Dealing with Retirement Assets in the Estate Plan," Illinois Institute for Continuing Legal Education, Springfield, Illinois, April 2009

- Speaker, "Legislative Outlook for 2008 and Ethical Developments," Northwest Suburban Bar Association, Palatine, Illinois, September 2008

- Speaker, "Drafting for IRAs and Employee Plans in an Estate Plan," Illinois State Bar Association, Full Bar Presentation, Bloomington, Illinois, March 2008

- Speaker, "Deductibility of Investment Advisory Fees in Light of the Supreme Court decision in *Knight v. Commissioner*," American Bar Association, Fiduciary Income Tax Committee, Lake Las Vegas, Nevada, January 2008

- Speaker, "Estate Planning Fundamentals," Illinois State Bar Association, Full Bar Presentation, Bloomington, Illinois, November 2007

- Speaker, "Recent Developments in Estate, Gift, GST and Income Taxes," Chicago Bar Association, Full Bar Presentation, Chicago, Illinois, November 2007
- Speaker, "Estate Planning Fundamentals," Illinois State Bar Association, Full Bar Presentation, Rockford, Illinois, October 2007
- Speaker, "Legislative Outlook for 2007 and Significant Developments," Northwest Suburban Bar Association, Palatine, Illinois, September 2007
- Speaker, "Structures, Implementation and Operation of the Family Office," American Bar Association, Tax Practice Management Committee, Vancouver, Canada, September 2007
- Speaker, "Fundamental Estate Planning for Modest Estates," Illinois State Bar Association, Full Bar Presentations, Rockford, Illinois, June 2007
- Speaker, "Recent Developments in Estate, Gift, GST and Income Taxes," Chicago Bar Association, Full Bar Presentation, Chicago, Illinois, November 2006
- Speaker, "What Practitioners Need to Know About Private Trust Companies," American Bar Association, Tax Practice Management Committee, Denver, Colorado, October 2006
- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, Washington, DC, May 2006
- Speaker, "Recent Developments in Light of Uncertain Estate Tax Laws," Joliet Estate Planning Council, Joliet, Illinois, April 2006
- Speaker, "Legislative Outlook for 2006 and Significant Developments for 2005," Northwest Suburban Bar Association, Palatine, Illinois, February 2006
- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, San Diego, February 2006
- Speaker, "Recent Developments in Probate Practice," Chicago Bar Association, Full Bar Presentation, Chicago, Illinois, November 2005
- Speaker, "When the Fireman Meets the Architect: Planning to Avoid Estate Contest from the Perspectives of a Litigator and an Estate Planner," Illinois State Bar Association, Full Bar Presentation, Chicago, Illinois, October 2005
- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, San Francisco, September 2005
- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, Washington, DC, May 2005

- Speaker, "Gift Tax Problems We All Want to Avoid: A Review of *Bigelow*, *Bongard* and *Senda*," Joliet Estate Planning Council, Joliet, Illinois, April 2005

- Speaker, "Legislative Outlook for 2005 and Significant Developments for 2004," Northwest Suburban Bar Association, Palatine, Illinois, February 2005

- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, San Diego, January 2005

- Speaker, "Drafting Wills and Trusts," Illinois State Bar Association, Full Bar Presentation, Chicago, Illinois, December 2004

- Speaker, "Recent Developments in Probate Practice," Chicago Bar Association, Full Bar Presentation, Chicago, Illinois, November 2004

- Speaker, "The Illinois Estate Tax and Code Section 2053," Chicago Bar Association, Tax Law Committee, Chicago, Illinois, November 2004

- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, Boston, October 2004

- Speaker, "Recent Developments in Trust Law," Chicago Bar Association, Trust Law Committee, Chicago, Illinois, September 2004

- Speaker, "Estate Planning and Drafting Considerations for Beneficiary Designations Under Qualified Plans and IRAs," Illinois State Bar Association, Full Bar Presentation, Chicago, Illinois, May 2004

- Speaker, "Current Developments in Estate and Gift Taxes,"American Bar Association, Estate and Gift Tax Committee, Washington, DC, May 2004

- Speaker, "Drafting for IRAs and Employee Plans in an Estate Plan," Joliet Estate Planning Council, Joliet, Illinois, April 2004

- Speaker, "Making Tax Time less Taxing," DePaul University, Alumni Relations and Networks, Chicago, Illinois, March 2004

- Speaker, "The New Illinois Estate Tax Law: The 'Add-On' Tax," Kane County Bar Association, Probate & Estate Committee, Wheaton, Illinois, January 2004

- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, Kissimmee, Florida, January 2004

- Speaker, "Planning Opportunities in Post Mortem Administration of Trusts and Estates: Federal and Illinois Estate Tax Changes and Planning Responses," Illinois State Bar Association, Full Bar Presentation, Collinsville, Illinois, November 2003

- Speaker, "Decoupling the State Estate Tax from the Federal Estate Tax," Lake County Bar Association, Wills, Trusts & Probate Committee Annual Seminar, Lake Forest, Illinois, November 2003

- Speaker, "The New Illinois Estate Tax," Chicago Bar Association, Trust Law Committee, Chicago, Illinois, October 2003

- Speaker, "Planning Opportunities in Post Mortem Administration of Trusts and Estates: Federal and Illinois Estate Tax Changes and Planning Responses," Illinois State Bar Association, Full Bar Presentation, Chicago, Illinois, October 2003

- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, Chicago, Illinois, September 2003

- Speaker, "Recent Developments Regarding FLPs, LLCs, and Code § 2036(a): The Application of § 2036(a) to *Strangi*, *Kimbell*, *Thompson* and *Harper*," Chicago Bar Association, Full Bar Presentation, Chicago, Illinois, June 2003

- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, Washington, DC, May 2003

- Speaker, "Estate Planning Considerations in Beneficiary Designations Made Under Qualified Plans and IRAs," Illinois State Bar Association, Full Bar Presentation, Chicago, Illinois, April 2003

- Speaker, "Estate Planning and Wealth Preservation," Filipino American Bar Association, Chicago, Illinois, March 2003

- Speaker, "How to Draft Wills and Trusts in Illinois," National Business Institute, Chicago, Illinois, March 2003

- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, San Antonio, Texas, January 2003

- Speaker, "Current Developments in Estate and Gift Taxes," American Bar Association, Estate and Gift Tax Committee, Los Angeles, California, October 2002

- Speaker, "IRAs: What You Need to Know When Creating and Estate Plan for your Client," Chicago Bar Association, Full Bar Presentation, Chicago, Illinois, September 2002

- Speaker, "Advanced Issues in Probate, Estate Administration and Fiduciary Income Tax for the Paralegal in Illinois," Institute for Paralegal Education, Chicago, Illinois, April 2002

Baker McKenzie.

- Speaker, "New Developments in § 529 Plans and Other Educational Incentives Under EGTRRA," American Bar Association, Estate and Gift Tax Committee, New Orleans, Louisiana, January 2002
- Speaker, "The New Tax Act: Impact on Educational Provisions," American Bar Association, Income Tax Committee, New Orleans, Louisiana, January 2002
- Speaker, "Impact of the New Tax Act for Estate Planners," Chicago Bar Association, Full Bar Presentation, November 2001
- Speaker, "Planning for Retirement," City of Chicago Department on Aging, Chicago, Illinois, November 2001
- Speaker, "The Making of the New Tax Law: A Review of the Bush Plan and How it Effects Young Lawyers," American Bar Association, Law Student Division, Chicago, Illinois, August 2001
- Speaker, "Advance Directives: POAs, Living Wills and Guardianships," Chicago Bar Association, and, City of Chicago Department on Aging, May 2001
- Speaker, "Advanced Issues in Probate for the Paralegal in Illinois," Institute for Paralegal Education, January 2001
- Speaker, "Estate Planning for New Attorneys," Illinois State Bar Association, Full Bar Presentation, Chicago, Illinois, December 2000

Audio Podcast and Whitepaper

- Co-author, "Trust Residency and State Tax Nexus Planning," ACTEC, February 2019
- Author, "Legal and Tax Structures in Organizing or Restructuring a Single Family Office," Family Office Association, January 2016

Webinar

- Co-presenter, "2016 Trust Nexus Survey Webinar: Learning from the Trust Nexus Survey," *Bloomberg BNA national webinar*, October 2016
- Presenter, "Trust Income Tax at the State Level: The Significance of State Residency for Trust Fiduciary Income Tax Purposes," Wolters Kluwer CCH, March 2016
- Presenter, "Understanding Family Offices: Purpose, Administration, and Structure," Wolters Kluwer CCH, December 2015