

## DAVID M. ENGLISH

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### EMPLOYMENT

#### *Long-Term Teaching Positions*

W.F. Fratcher Missouri Endowed Professor of Law, University of Missouri-Columbia, since 1999; Edward L. Jenkins Professor of Law, since 2015. Courses taught: Elder Law, Estates and Trusts, Estate Planning and Taxation, Federal Income Tax, Property, Will and Trust Drafting, Fiduciary Administration.

Professor of Law, Santa Clara University, 1995-1999. Courses taught: Property, Estate Planning and Taxation, Wills and Trusts, Elder Law.

Professor of Law, University of South Dakota, 1993-1995; Associate Professor, 1991-1993; Assistant Professor, 1987-1991. Courses taught: Trusts and Wills, Estate and Gift Tax, Estate Planning, Elder Law, Federal Income Tax, Corporate Income Tax.

#### *Visiting Professorships*

Adjunct Professor, Syracuse University College of Law. Spring 2024. Course taught: Estate Planning.

Visiting Professor of Law, University of Illinois at Chicago Law School, Fall 2019. Courses taught: Estates and Trusts, Federal Income Taxation.

Mason Ladd Distinguished Visiting Professor of Law, University of Iowa, Fall 2012. Courses taught: Property, Trusts and Estates.

Fulbright Visiting Professor of Law, University of Tokyo, Spring-Summer 2004. Courses Taught: American Trust Law, Elder Law.

Visiting Professor of Law, University of Pittsburgh, Fall 1989. Courses taught: Estates and Trusts, Estate Planning.

#### *Guest Professorships*

University of Tokyo, Summer 2015  
Aoyama Gakuin University, Tokyo, Japan, Summers 2011, 2015  
East China University of Politics and Law, Shanghai, China, May 2013  
Fuzhou University, Fuzhou, China, Summer 2013

*Prior to Law Teaching:*

Partner, 1986-1987, and Associate, 1981-1985, D'Ancona & Pflaum, Chicago, IL.  
Associate, 1979-1981, McDermott, Will & Emery, Chicago, IL.  
Trust Administrator, 1974-1976, Wachovia Bank & Trust Company, Winston-Salem, NC.

## EDUCATION

Northwestern University, J.D., cum laude, 1979. Projects Editor, Journal of Criminal Law and Criminology, 1978-1979. Elected to The Order of the Coif. Admitted to practice, Illinois, 1979.

Duke University, B.A., magna cum laude with Distinction in Economics, 1974. Angier B. Duke Scholar. Elected to Phi Beta Kappa.

## LICENSES

Licensed to practice law in Illinois in 1979, in South Dakota in 1992.

## HONORS AND AWARDS

1. Elected member, Estate Planning Hall of Fame, National Association of Estate Planning Councils, awarded Nov. 2023
2. Advocate of the Month, American Bar Association, Sept. 2022
3. Richard Wellman Award, Joint Editorial Board for Uniform Trust and Estate Acts, 2022
4. Lloyd Roberts Prize in Administration of Justice, University of Missouri-Columbia School of Law, 2018, 2002
5. Honorary Member, Society of Trust and Estate Practitioners (STEP), 2013
6. National College of Probate Judges, Robert Treat Award for Outstanding Contribution to Probate Law, 2011
7. Honorary Member, Special Needs Alliance, 2010
8. Fulbright Lecture-Research Award, Japan-United States Educational Commission, 2004
9. Elected Member, International Academy of Trust and Estate Law, 2002
10. 2000 Blackwell Sanders Teaching Award, University of Missouri-Columbia.
11. 1999 John J. Regan Writing Award, National Academy of Elder Law Attorneys.
12. 1997 Faculty Scholarship Award, Santa Clara University School of Law.
13. Elected Member, American Law Institute, 1994

13. 1994 Excellence in Writing Award, Probate & Property Magazine.
14. Academic Fellow, American College of Trust and Estate Counsel, 1992-present.
15. 1992 John Wesley Jackson Memorial Award for Outstanding Professor of Law, University of South Dakota.

## PUBLICATIONS

### Books

Wills, Trusts & Estates, with Sheldon Kurtz and Thomas Gallanis, West Academic, 6<sup>th</sup> ed. (2021), 5<sup>th</sup> ed. (2017) with Sheldon Kurtz and William McGovern, 4<sup>th</sup> ed. (2010).

Probate & Surrogate Laws Manual, Missouri Practice, Volumes 4A-4B, Thompson Publishing, 2016 and subsequent updates.

Probate Law and Practice, Missouri Practice, Volumes 5-5D, Thomson Reuter, 2016 and subsequent updates.

Principles of Wills, Trusts and Estates, with Sheldon Kurtz and William McGovern, West Publishing, 2d ed. (2012).

Fiduciary Accounting and Trust Administration Guide, with Robert Whitman, ALI-ABA, 2002; 2d ed., 2008.

Tax, Estate and Financial Planning for the Elderly, with Rebecca C. Morgan, Matthew Bender & Co., 1996 and subsequent releases.

Tax, Estate and Financial Planning for the Elderly: Forms and Practice, with Rebecca C. Morgan and Michael Gilfix, Matthew Bender & Co., 1996 and subsequent releases.

### Articles and Book Chapters Published in US and UK

1. *Jurisdictional Conflicts in Adult Guardianship*, 97 Tulane Law Review 743 (2023).
2. *The Fourth National Guardianship Symposium: An Introduction*, 72 Syracuse Law Review (2022).
3. *Protective Orders and Limited Guardianship: Legal Tools for Sidelining Plenary Guardianship*, with Nina Kohn, 72 Syracuse Law Review (2022).
4. *Supported Decision-Making in the US: History and Legal Background*, The Voice, Vol. 16(6) (Aug. 2022).
5. *So Many Have Died: COVID-19 in America's Nursing Homes*, Probate & Property, Jan./Feb. 2021, at 12.
6. *Two More Plumbers Look at the Leak: Purchasing an Annuity in an Institutionalized Spouse's IRA That is Irrevocably Payable to the Community Spouse May Work for*

- Medicaid Purposes But Runs a Risk of Adverse Tax Treatment*, with Ron Landsman, 16 NAELA Journal 131 (2021).
7. *COVID-19 and Its Impact on America's Retirement System*, 46 ACTEC J. 35 (2020).
  8. *Guardianship*, in Macmillan Encyclopedia of Families, Marriages & Intimate Relationships (2019).
  9. *Arbitration and the United States Uniform Trust Code*, in Arbitration of Trust Disputes, Chapter 6, Oxford University Press (2016).
  10. *Amending the Uniform Guardianship and Protective Proceedings Act to Implement the Standards and Recommendations of the Third National Guardianship Summit*, 12 NAELA J. 33 (2016).
  11. *Case Law Under the UTC Through 2014*, American College of Trust and Estate Counsel (2016), with Scot Boulton and Dana Fitzsimons, Jr.
  12. *The Home: Where Our Heart Resides*, Experience, Summer 2014, at 4.
  13. *Legal Challenges to Achieving an Age-Friendly Society in the United States*, 35 BiFocal 126 (2014).
  14. *The Impact of Uniform Laws on the Teaching of Trusts and Estates*, 58 St. Louis University L.J. (2014).
  15. *The Fiduciary Duties and Powers of a Trustee Under the Uniform Trust Code*, Trusts & Trustees, Feb. 2014, at 52.
  16. *Comparing the Chinese Trust Law with the Uniform Trust Code*, with Yuan Zhu, Trusts & Trustees, Feb. 2014, at 87.
  17. *Uniform Trust Code: Part 1*, West's Estate Planning Service. Dec. 2012; *Part 2*, West's Estate Planning Service, Jan. 2013.
  18. *Financial Decision-Making for Adults Lacking the Capacity to Make Their Own*, Generations, Summer 2012, at 66.
  19. *Disclose. Disclose! Disclose? Longmeyer Distorts the Trustee's Duty to Inform Trust Beneficiaries*, Probate and Property, August 2010, at 12, with Turney P. Berry & Dana G. Fitzsimons Jr.
  20. *New Guidance on Guardianship Jurisdiction*, Probate and Property, Feb, 2010, at 10.
  21. *Longmeyer Exposes (or Creates) Uncertainty About the Duty to Inform Remainder Beneficiaries of a Revocable Trust*, with Turney P. Berrt & Dana G. Fitzsimons Jr., 35 ACTEC J. 125 (2009).
  22. *Uniform Trust Code*, in International Trust Laws (2d ed. 2008).
  23. *Cross-Border Guardianship: Proposed Changes in US Law*, UTC Notes, Summer 2006.
  24. *The Florida Uniform Trust Code*, UTC Notes, Summer 2006.
  25. *A Uniform Probate Code for Indian Country at Last*, Probate and Property, March/April 2006, at 20.
  26. *Creation of Trusts Under the Uniform Trust Code*, National College of Probate Judges Life and Times (2005).
  27. *Revocable Trusts Under the Uniform Trust Code*, National College of Probate Judges Life and Times (2004).
  28. *The New Mexico Uniform Trust Code*, 34 N.M. Law Review 1 (2004).

29. *Trust Modification and Termination Under the Uniform Trust Code*, National College of Probate Judges Life and Times (2003).
30. *The Kansas Uniform Trust Code*, 51 Kansas Law Review 311 (2003).
31. *Effect of Uniform Laws on Trustee Investment*, 6 Journal of Investment Consulting Management.71 (2003).
32. *The Controversy Over UTC §105(b)(8)*, UTC Notes, Spring 2003, at 2.
33. *Income Tax Planning for the Elderly*, 9 ALI-ABA Estate Planning Course Materials Journal 5 (2003).
34. *Uniform Trust Code (2000)*, National College of Probate Judges Life and Times (2003).
35. *Uniform Trust Code (2000)*, NAELA Quarterly, Winter 2003, at 36.
36. *Guardianship*, in International Encyclopedia of Marriage and the Family (MacMillan 2003).
37. *The Kansas Uniform Trust Code*, UTC Notes, Winter 2002, at 2.
38. *Income Tax Planning for Long-Term Care*, 28 ACTEC Journal 5 (2002).
39. *Analyzing the Trust Code*, 67 Missouri Law Review 141 (2002).
40. *The Uniform Trust Code (2000): Significant Provisions and Policy Issues*, 67 Missouri Law Review 143 (2002).
41. *The Uniform Trust Code (2000) and Its Application to Ohio*, 30 Capital University Law Review 1 (2002).
42. *Uniform Trust Code-The Study Process*, UTC Notes, May 2002, at 2.
43. *The American Uniform Trust Code*, in Extending the Boundaries of Trusts and Similar Ring-Fenced Funds (Kluwer Law International 2002).
44. *The Uniform Trust Code and Its Application to Ohio*, 12 Probate Law Journal of Ohio 1 (2001).
45. *The Uniform Health-Care Decisions Act and Its Progress in the States*, Probate & Property, May/June 2001, at 19.
46. *The California Principal and Income Act*, California Trusts & Estates Quarterly, Spring 2000, at 4.
47. *Nursing Home Residents and the New California Health Care Decisions Law*, 31 McGeorge Law Review 733 (2000), with Rebecca C Morgan.
48. *Is There a Uniform Trust Act in Your Future?*, Probate &Property, Jan./Feb. 2000, at 24.
49. *Income Tax Planning for Long-Term Care*, 1 Elder's Advisor 44 (1999).
50. *Teaching Elderlaw in the 21<sup>st</sup> Century*, NAELA Quarterly, Spring 1999, at 25.
51. *Taxes and Long-Term Care*, with Kandis Scott, California Bar Journal, April, 1999.
52. *The Uniform Guardianship and Protective Proceedings Act (1997)*, with Rebecca C. Morgan, NAELA Quarterly, Summer 1998, at 3.
53. *Income Tax Planning for the Elderly*, The ElderLaw Report, Part I, May 1998, at 1; Part II, June 1998, at 1.
54. *1997 Federal Legislative Changes Affecting Elder Law Practices*, with Alfred J. Chiplin, Jr., and Rebecca C. Morgan, NAELA Quarterly, Winter 1998, at 3.
55. *What Estate Planners and Their Clients Should Know About Social Security*, 25 Estate Planning 96 (1998).

56. *Supreme Court Upholds State Statutes Barring Physician-Assisted Suicide*, 24 Estate Planning 392 (1997).
57. *Tax Planning for the Elderly*, 55 NYU Institute of Federal Taxation ¶ 2900 (1996).
58. *New Legislation on Long-Term Care and Other Tax Issues Affecting the Elderly*, 23 Estate Planning 494 (1996).
59. *The Authority of a Guardian to Commit an Adult Ward*, 20 Mental and Physical Disability Law Reporter 584 (1996).
60. *Physician-Assisted Suicide Confronted by Courts and Legislatures/Social Security Earnings Limit Increased/Uniform Health-Care Decisions Act Adopted*, 23 Estate Planning 230 (1996).
61. *Survey Results: Use of Durable Powers*, with Kimberly Wolff, Probate & Property, January/February 1996, at 33.
62. *Minors' Guardianship in an Age of Multiple Marriage*, 29 Institute on Estate Planning ¶500 (1995).
63. *Guardianship*, in Encyclopedia of Marriage and the Family (MacMillan 1995).
64. *Emerging Trends in Healthcare Decisionmaking: State Legislation*, in Estate Planning - 1993 (UCLA-CEB 1994).
65. *The Uniform Health-Care Decisions Act Gives New Guidelines*, with Alan Meisel, 21 Estate Planning 355 (1994).
66. *The Health-Care Decisions Act Represents a Major Advance*, Trusts & Estates, May 1994, at 32.
67. *Gift of Life: The Lawyer's Role in Organ and Tissue Donation*, Probate & Property, March/April 1994, at 10.
68. *The South Dakota Guardianship and Conservatorship Act*, South Dakota State Bar Newsletter, Oct. 1993, at 21.
69. *Defining the Right to Die*, 56 Law and Contemporary Problems 255 (1993).
70. *The UPC and the New Durable Powers*, 27 Real Property Probate and Trust Journal 333 (1992).
71. *The Uniform Guardianship and Protective Proceedings Act: How Uniform Is It?*, Part I, NAELA Quarterly, Summer 1993, at 1; Part II, NAELA Quarterly, Fall 1993, at 21.
72. *A Checklist for Long-Term Care Coverage*, The Practical Lawyer, June 1993, at 15.
73. *The Proposed South Dakota Guardianship and Conservatorship Act*, South Dakota State Bar Newsletter, May 1992, at 10.
74. *The Rights of Nursing Home Patients*, Trusts & Estates, July 1991, at 28.
75. *Proposed Legislative Response to Pope*, South Dakota State Bar Newsletter, Nov. 1988, at 11.
76. Note, *Judicial Supervision Over Covert Entries*, 69 Journal of Criminal Law and Criminology 357 (1978).
77. Note, *Fifth Amendment--Double Jeopardy*, appearing in the Annual Supreme Court Review, 68 Journal of Criminal Law and Criminology 555 (1977).

#### Articles Published in Japan

1. *Revising the US Law on Adult Guardianship*, 13 *Adult Guardianship Law Review* 163 (2016).
2. *Hague Conventions on Guardianship and Prospects for US Ratification*, Proceedings of the 2010 World Congress on Adult Guardianship, Yokohama, Japan.
3. *Implementing Advance Directives: Recent Trends in the US*, Proceedings of the 2010 World Congress on Adult Guardianship, Yokohama, Japan.
4. *The Missouri Family Trust as a Possible Model for Japan*, Proceedings of the 2010 World Congress on Adult Guardianship, Yokohama, Japan.
5. *Making Health-Care Decisions for the Incapacitated: Legislative Trends in the American States* (2006).
6. *Trust Modification and Termination under the Uniform Trust Code*, *Shintaku* 223, July 2005.
7. *Comparing Japanese and US Guardianship Law*, *Journal of the Japan Guardianship Association*, April, 2005.
8. *Primer on American Trust Law*, Trust 60 Foundation, Japan (2005).
9. *Uniform Trust Code (2000)*, Academic Society for Trust Law in Japan (2004).
10. *Drafting the Uniform Trust Code, 2000-2* *Amerikaho* 190, *Journal of the Japanese American Society for Legal Studies*.
11. *The Uniform Trust Act: Significant Issues*, *Shintaku* No. 202, May 2000.
12. *The Need to Codify the Law of Trusts: The Experience From the Uniform Trust Act*, Trust Companies Association of Japan, *Shintaku* No. 201, Feb., 2000.

#### Articles Published in China

1. *Supported Decisionmaking in the US, in Missouri, and Beyond*, *Asian Congress on Adult Guardianship* (2019).
2. *Challenges to Building an Age Friendly Society in the United States*, 30 *Wenzhou Journal of Social Science* 38 (2017).
3. *Revising the US Law on Adult Guardianship*, *Wenzhou Journal of Social Science*, 2016 Vol. 1.
4. *Assuring Retirement Security for America's Elderly*, 1 *Social Law Review* 339 (2014).
5. *The US Law on Charitable Gifts*, 1 *Social Law Review* 351 (2014).
6. *The US Uniform Trust Code and Its More Significant Innovations in US Trust Law*, Proceedings of the China Trust Law Conference, East China University of Politics and Law, Shanghai, China, October, 2011.

#### Book Chapter Published in Germany

*Amending the UGPPA to Implement the Third National Guardianship Summit*, appearing in *Liber Amicorum Makoto Arai*, Nomos, Baden-Baden, Germany (2015), at 247.

#### Article Published in South Korea

1. *The Uniform Guardianship, Conservatorship and Other Protective Arrangements Act*, Proceedings of the 2018 World Guardianship Congress, Seoul, South Korea, October 2018.
2. *The Use of Revocable Trusts in Estate Planning*, 2012 Annual Meeting, Korean Association on Comparative Law.

#### Article Published in Singapore

*The Uniform Trust Code and the Future of American Trust Law*, proceedings from conference “The Use and Abuse of Trusts and Other Wealth Management Devices,” sponsored by Singapore Management University, York Law School, and Singapore Academy of Law, July 2017.

#### PROFESSIONAL POSITIONS

##### United States Uniform Law Commission

###### *Current Positions:*

Uniform Law Commissioner, State of Missouri, since 2000.

Member, Joint Editorial Board for Uniform Trust and Estate Acts, since 2013; Executive Director, 1998-2013; Reporter, 1995-1998.

Member, Drafting Committee on Conflicts of Law in Trusts and Estates, since 2020.

National Conference Co-Reporter, Drafting Committee on Model Indian Probate Code, since 2013; Member, Study Committee, 2008-2013.

Member, Standing Committee on Liaison with the American Bar Association, 2005-2009; Vice-Chair, 2009-present.

###### *Former Positions:*

Member, Study Committee on the Uniform Health-Care Decisions Act, 2020-2021, Drafting Committee, 2021-2023.

Member, Study Committee on Uniform Determination of Death Act, 2020-2021, Drafting Committee, 2021-2023.

Chair, Drafting Committee on Community Property Disposition at Death Act, 2019-2021.

Member, Drafting Committee on Cohabiting Couples, 2018-2021; Member, Study Committee, 2017-2018.

Member, Standing Committee on Review of Conference Acts, 2008-2021.

Member, Committee to Monitor Healthcare Law, 2014-2020.

Chair, Drafting Committee to Revise the Uniform Probate Code, 2019-2020.

Member, Drafting Committee on Revised Uniform Principal and Income Act, since 2015-2018.

Chair, Drafting Committee on the Uniform Guardianship, Conservatorship, and Other Protective Arrangements Act, 2014-2018.

Member, Committee on Technical Amendments in Light of *Obergefell* Decision, 2016-2017.



Chair, Drafting Committee on Uniform Recognition of Substitute Decisionmaking Documents Act, 2012-2015; Chair, Study Committee, 2011-2012.  
Member, Drafting Committee on Trust Decanting Act, 2011-2016.  
Member, Drafting Committee on Uniform Powers of Appointment Act, 2011-2013.  
Member, Joint Editorial Board on International Law, 2006-2013.  
Member, Drafting Committee on Uniform Principal and Income Act Amendments, 2007-2009;  
Member, Standby Committee, since 2009-2012.  
Member, Study Committee on Mental Health Advance Directives, 2008-2010.  
Member, Drafting Committee to Amend Uniform Probate Code, 2006-2009.  
Reporter, Drafting Committee on Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act, 2005-2007.  
Member, Drafting Committee to Revise the Uniform Anatomical Gift Act, 2004-2007.  
Member, Drafting Committee on Uniform Power of Attorney Act, 2002-2006.  
Reporter, Drafting Committee, Uniform Trust Code, 1994-2001.  
Advisor, Drafting Committee on Uniform Guardianship and Protective Proceedings Act, 1994-1998.  
Reporter, 1992-1993, Advisor, 1991-1992, Uniform Health-Care Decisions Act.

#### American Bar Association

##### ABA-Wide Positions

###### *Current Position:*

Member, ABA Task Force on Guardianship, since 2022.

###### *Former Positions:*

Member, House of Delegates. 2005-2015, 2021-2023  
Chair, Commission on Law and Aging, 2012-2015, Member, 2001-2004, 2009-2012.  
Member, Nominating Committee, 2010-2011.  
Member, House of Delegates Committee, Issues of Concern to the Legal Profession, 2007-2008.  
Member, Commission on Mental and Physical Disability Law, 2007-2009.  
Member, Special Committee on Bioethics, 2004-2007.

##### ABA Section of Real Property Trust and Estate Law

###### *Former Positions:*

Chair, 2018-2019  
Chair-Elect, 2017-2018  
Member, Executive Committee, 2005-2020, 2021-2023

Chair, Planning Committee, 2017-2018; Member, since 2003; Co-Chair, Subcommittee on Liaisons, 2011-2013; Member, Subcommittee on Strategic Plan, 2010-2011; Co-Chair, Subcommittee on Diversity Plan, 2008-2010.  
Chair, Nominating Committee, 2020-2021; Vice-Chair, 2019-2020.  
Section Vice-Chair in Charge of Trust and Estate Division, 2015-2017.  
Co-Chair, Special Committee on ABA Relations, 2011-2016.  
Chair, National Conference of Lawyers and Corporate Fiduciaries, 2013-2015.  
Co-Chair, Community Outreach Committee, 2013-2015.  
Co-Chair, Diversity Committee, 2010-2011, Member, 2000-2004, 2009-2010.  
Member, Committee on Groups and Substantive Committees, since 2013-2015.  
Section Representative, ABA Day, 2011, 2012, 2013.  
Member, Task Force on USA Patriot Act and Gatekeeper Regulation, 2007-2013.  
Member, Task Force on Law School Real Property Curriculum, 2007-2011.  
Member, Task Force on American Indian Probate Reform, 2006-2008.  
Member, Advisory Committee, 2001-2008.  
Member, Publications Committee, 1998-2006.  
Member, Nominating Committee, 2002-2003.  
Member, Supervisory Council, 1997-2003.  
Member, CLE Committee, 1997-1998.  
Group Chair, Committees on Retirement and Disability Planning, 1996-1997.  
Member, Standing Committee on Bylaws, 1996-1998.  
Chair, Committee on Healthcare Decisions, 1992-1996.  
Chair, Special Committee on Organ and Tissue Donation, 1993-1996.  
Chair, Special Committee on Limited Liability Companies, 1992-1993.  
Chair, Committee on Long-Term Health Care, 1991-1992.  
Vice-Chair for Publications, 1990-1992, Committee on Significant Current Probate and Trust Legislation.  
Keeping Current Editor, Probate and Property Magazine, 1991-1992.

American College of Trust and Estate Counsel

*Current Positions:*

Member, Committee on Legal Education, 2010-present.  
Member, Committee on State Laws, 1993-present.  
Member, Elder Law Committee, 1992-present.

*Former Positions:*

Member, Board of Directors, ACTEC Foundation, 2016-2022.  
Member, Program Committee, 2013-2016, 1994-1995.  
Member, Missouri Membership Committee, 2007-2015.  
Member, Nominating Committee, 2011-2014.

Member, Committee on Estate Planning in the 21st Century, 2011-2013.  
Member, Intellectual Property Committee, 2010-2012.

#### Missouri State Bar

Member, Probate and Trust Committee, since 1999; Chair, 2010-2013; Vice-Chair, 2006-2010;  
Chair, Guardianship Subcommittee, 2011-2019; Member, 2008-2011.  
Member, Trust Law Revision Subcommittee, since 1999.

#### South Dakota Section of Real Property Probate and Trust Law

Member, Executive Council, 1994-1995.  
Co-Chair, Probate Reform Committee, 1992-1995.  
Chair, Guardianship Committee, 1989-1993.

#### Other Organizations

##### *Current Positions:*

Member, National Guardianship Network, since 2019, Chair, 2021-2023.  
Co-Chair, Guardianship Reform Task Force, Missouri Developmental Disabilities Council, since  
2011.  
Member, Elder Law Advisory Board, Lexis/Nexis, since 2006.

##### *Former Positions:*

Member, Advisory Board, Elder Law Concentration, John Marshall Law School, Chicago, 2012-  
2015.  
Member, National Guardianship Network Implementation Committee, Third National  
Guardianship Symposium, 2011-2014.  
Member, Missouri Department of Health and Senior Services Advisory Committee on Seniors  
Legal Help Line, since 2010-2014.  
Member, Advisory Board, US Consumer Finance Protection Bureau Lay Fiduciary Guide  
Project, 2012-2013.  
Advisor, National Probate Court Standards, National Center for State Courts, 2011-2013.  
Member, Advisory Council, Special Trustee for American Indians, United States Department of  
the Interior, 2004-2012.  
Member, Advisory Council, University of Miami Heckerling Institute on Estate Planning, 2002-  
2009.  
Consultant on Organ Donation, Office of the Secretary, United States Department of Health &  
Human Services, 2001.  
Consultant on Trust Law, Asian Development Bank, 2000.  
Member, Editorial Board and Elder Law Columnist, Estate Planning Magazine, 1995-2002.

Member, US Dept. Health & Human Services Advisory Committee on Social Security Representative Payment, 1998.  
Consultant on Health Law, California Law Revision Commission, 1997-1999.  
Reporter, Task Force on Guardianship Reform, ABA Senior Lawyers Division, 1992-1994.  
Member, Board of Directors, South Dakota Guardianship Program, 1992-1994.  
Member, Review Committee, National Probate Court Standards Commission, National Center for State Courts, 1992-1993.

## PRESENTATIONS

### *International Speeches and Presentations (Since 2010)*

1. *US Trust and Property Law*, East China University of Political Science and Law, December 2022.
2. *Use of Trusts in Family Estate Planning*, China Guoco Law Firm, June 2021.
3. *How US Family Trust Might Be Adapted for Japan*, Japan Elder Law Society, April 2021.
4. *Supported Decisionmaking in the US, in Missouri, and Beyond*, Asian Congress on Adult Guardianship, November 2019.
5. *Special Needs Trusts in the US*, Asian Guardianship Association, Seoul, South Korea, October 2018, Japan Adult Guardianship Association, Tokyo, October 2018.
6. *The Uniform Guardianship, Conservatorship and Other Protective Arrangements Act*, World Congress on Adult Guardianship, Seoul, South Korea, October 2018.
7. *The Uniform Trust Code and the Future of American Trust Law*, presented via Skype at International Trust Law Conference sponsored by China Trust Law Association and Renmin University, September 2017.
8. *Comparing the Guardianship Law of the United States and Singapore*, Singapore Law Society, July 2017.
9. *The Uniform Trust Code and the Future of American Trust Law*, presented at conference "The Use and Abuse of Trusts and Other Wealth Management Devices," sponsored by Singapore Management University, York Law School, and Singapore Academy of Law, July 2017.
10. *The Affordable Care Act*, Guangdong Pharmaceutical University, Guangzhou, China, November 2016; Four Province Social Law Conference, Wenzhou, China, November 2016.
11. *The US Medicare Program*, Guangdong Pharmaceutical University, Guangzhou, China, November 2016.
12. *The US Social Security Program*, Shaoguan University, Shaoguan, China, November 2016.
13. *Assuring Adequate Retirement Income for America's Elderly*, Wenzhou University, Wenzhou, China, November 2016.
14. *Assuring an Age-Friendly Society for America's Elderly*, South China Normal University, Guangzhou, China, November 2016.

15. *Special Needs Trusts and ABLE Accounts in the US*, Chuo University, Tokyo, Japan, June 2015.
16. *Housing Issues for the Elderly*, AIG Companies Japan, Toyko, Japan, June 2015.
17. *Health Care for the Elderly*, Institute of Gerontology, University of Tokyo, June 2015.
18. *Revising the US Law on Adult Guardianship*, Japan Adult Guardianship Association, June 2015, Tokyo, Japan; Wenzhou University, Wenzhou, China, March 2015.
19. *Special Needs Trusts and ABLE Accounts in the US*, Japan Adult Guardianship Association, June 2015.
20. *Special Needs Trusts Trusts in the US*, University of Hong Kong, March 2015.
21. *Legal Challenges to Achieving an Age-Friendly Society in the United States*, Liaocheng University, Liaocheng, China, March 2015; Beijing Administrative College, Beijing, China, March 2014; International Conference, Road-Map for an Age-Friendly Society, University of Tokyo, Tokyo, Japan, March 2014.
22. *The Midwest Special Needs Trust as a Possible Model for Hong Kong*, Hong Kong University, March 2015.
23. *The Duties and Liabilities of a Charitable Trustee*, Liaocheng University, Liaocheng, China, March 2015.
24. *Health Insurance in the United States*, Guangdong Pharmaceutical University, March 2015.
25. *The US Law on Charitable Endowments*, Wuyi University, Jiangmen, China, March 2015.
26. *Guardianship Reform in China and Japan*, World Congress on Adult Guardianship, Washington, DC, May 2014.
27. *Amending the Uniform Guardianship and Protective Proceedings Act to Implement the Third National Guardianship Summit*, World Congress on Adult Guardianship, Washington, DC May 2014.
28. *East Asia Guardianship Conference*, Washington, DC, May 2014.
29. *Assuring Adequate Retirement Income for America's Elderly*, East China University of Political Science and Law, Shanghai China, March 2014.
30. *Comparing China's Trust Law With the US UTC*, East China University of Political Science and Law, Shanghai, China, March 2014.
31. *Legal Challenges to Achieving an Age-Friendly Society in the United States*, Beijing Administrative College, Beijing, China, March 2014.
32. *Legal Challenges to Achieving an Age-Friendly Society in the United States*, International Conference, Road-Map for an Age-Friendly Society, University of Tokyo, Tokyo, Japan, March 2014.
33. *Assuring Retirement Security for America's Elderly*, 2013 Annual Meeting, China Association of Social Law, Guangzhou, China, September 2013.
34. *The US Law on Charitable Gifts*, 2013 Annual Meeting, China Association of Social Law, Guangzhou, China, September 2013.
35. *The Missouri Family Trust as a Possible Model for China*, 2013 International Society Law Seminar, Fuzhou University, Fuzhou, China, June 2013.

36. *The Fiduciary Duties of a Trustee Under the Uniform Trust Code*, 2013 Annual Meeting, International Academy of Estate and Trust Law, Shanghai, China, May 2013.
37. *Comparing the Chinese Trust Law with the US Uniform Trust Code*, 2013 Annual Meeting, International Academy of Estate and Trust Law, Shanghai, China, May 2013.
38. *The Authority of Guardians to make Health-Care Decisions*, Japan Legal Support Center for Guardians, Tokyo, Japan, March 2013.
39. *The Uniform Health-Care Decisions Act*, Yamanashi Prefectural University, Kufo, Japan, March 2013.
40. *Use of Trusts in Family Estate Planning in the US*, Chuo University Institute of Comparative Law, Tokyo, Japan, March 2013; Chonnam National University, Gwangju, South Korea, August 2012.
41. *The Creation and Use of Revocable Trusts in the United States*, South Korea Institute of Comparative Law, Seoul, South Korea, August 2012.
42. *The US Uniform Trust Code and Its Impact on Business Trusts*, East China University of Politics and Law, Shanghai, China, November, 2011.
43. *The US Uniform Trust Code and Its More Significant Innovations*, China Trust Law Conference, Shanghai, China, October, 2011; Faculty Seminar, Aoyama Gakuin University, Tokyo, Japan, June 2011.
44. *The Missouri Family Trust as a Possible Model for Japan*, Japan Guardianship Association, Tokyo, Japan, June 2011; 2010 World Congress on Adult Guardianship, Yokohama, Japan, October, 2010.
45. *Explaining Variations in US Uniform Acts: The Example of the Uniform Trust Code*, Seminar, Chuo University, Tama, Japan, June 2011.
46. *The Third Restatement of Trusts*, University of Tokyo Trust Law Seminar, June, 2011.
47. *Case Law Under the UTC*, University of Tokyo Trust Law Seminar, October 2010.
48. *Hague Conventions and the US*, 2010 World Congress on Adult Guardianship, Yokohama, Japan, October 2010.
49. *Trusts as an Alternative to Guardianship*, 2010 World Congress on Adult Guardianship Congress, Yokohama, Japan, October 2010.
50. *Recent Developments in Health-Care Decisions*, 2010 World Congress on Adult Guardianship, Yokohama, Japan, October, 2010.

#### National Speeches and Presentations (Since 2010)

1. *Creditor's Claims: Spendthrift and Discretionary Trusts Under the Uniform Trust Code*, 2023 Tax and Estate Planning Forum, online, October 2023.
2. *Probate and Trust Codes, Required Notices and Creditor Claims*, Heart of America Estate Planning Institute, Tulsa, October 2021, St. Louis, February 2019.
3. *ACTEC Academic Fellows: 1999 vs. 2020*, The Future of Trusts and Estates, University of Iowa, September 2021.
4. *Legal Options for Individuals with Special Needs or Disabilities*, American College of Trust and Estate Counsel Diversity video, March 2021.

5. *Supported Decision-Making*, American College of Trust and Estate Counsel podcast, March 2021.
6. *COVID-19 and America's Nursing Homes*, American College of Trust and Estate Counsel podcast, October 2020.
7. *Top Cases Under the Uniform Trust Code*, Duke University Estate Planning Conference, October 2020.
8. *Cross-Border Recognition of Powers of Attorney and Guardianship*, American College of Trust and Estate Counsel program and podcast, March 2020.
9. *The UTC and the Future of American Trust Law, Annual Meeting*, American College of Trust and Estate Counsel, Palm Springs, CA, March 2019.
10. *Estate Planning 101: What You Need to Know About the Tax Cuts and Jobs Act*, ABA CLE Webinar, December 2018.
11. *The Recently Approved Uniform Directed Trust Act*, ABA Section of Real Property, Trust and Estate Law Webinar, March 2018.
12. *Uniform Guardianship, Conservatorship & Other Protective Arrangements Act*, ABA Section of Civil Rights and Social Justice Webinar, February 2018.
13. *Modification and Termination of Irrevocable Trusts*, ABA Section of Real Property Trust and Estate Law Webinar, September 2017.
14. *Clarity and Comfort Under the Uniform Directed Trust Act*, ABA Section of Real Property Trust and Estate Law Webinar, June 2017.
15. *Explaining Variations in US Trust Law, The Example of the Uniform Trust Code*, Workshop on Diffusion and Transformation of Trusts, Yenching Institute, Harvard University, April 2017.
16. *The Theory of Supported Decisionmaking*, The Arc 2016 National Convention, October 2016, Orlando, Florida.
17. *Changes Coming to the Uniform Guardianship Act*, 2016 Annual Meeting, National Guardianship Association, October 2016, Charleston, South Carolina.
18. *Recent Developments in Social Security*, American College of Trust and Estate Counsel, 2016 Annual Meeting, Las Vegas, Nevada, March 2016.
19. *Taking the UTC Down the Pacific Coast Highway*, American College of Trust and Estate Counsel, Fall Meeting, Monterey, California, November 2015.
20. *Guardianship Reform and Supported Decision-Making*, 2015 National Leadership Institute, ARC of the US, Providence, Rhode Island, July 2015.
21. *Uniform Laws: Changing Estate Planning Practice Across the Nation*, ALI CLE Webinar, November 2014.
22. *The Epidemic of Elder Financial Exploitation: Ethical Traps for Lawyers and Skills Every Lawyer Needs*, Showcase Program, ABA Annual Meeting, Boston, August 2014.
23. *Planning for an Aging Population - Your Clients, Your Parents and Someday You!*, Showcase Program, ABA Annual Meeting, Boston, August 2014.
24. *The Model Tribal Probate Code Project*, Indian Tribal Sovereignty Symposium, Oklahoma City, Oklahoma, June 2014.
25. *The Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act*, NAELA Annual Meeting, Scottsdale, Arizona, May 2014.

26. *The Trust in China and Japan*, Society of Trust and Estate Practitioners, International Estate Planning seminar, New York, March 2014.
27. *Diversity: Serving 21<sup>st</sup> Century Clients With More Than Just Good Wills and Great Trusts*, Annual Meeting, American College of Trust and Estate Counsel, Tucson Arizona, March 2014.
28. *The Revised National Probate Court Standards*, 2013 Annual Conference, National Association of Court Management, San Antonio, Texas, July 2013.
29. *Taxation of Special Needs Trusts Following ATRA*, Spring CLE Symposium, ABA Section of Real Property Trust & Estate Law, Washington DC, May 2013.
30. *Drafting a Model Tribal Probate Code*, 2013 Annual Indian Law Conference, Federal Bar Association, Santa Fe, New Mexico, April 2013.
31. *It's All About the Details: Jurisdiction, Venue, Governing Law-Where Do You Challenge a Trust or Trustee?*, 2012 Stetson Special Needs Conference, St. Petersburg, Florida, October 2012.
32. *International Conventions on Wills and Trusts*, 2012 Annual Meeting, Advisory Committee on Private International Law, US Department of State, Washington DC, October 2012.
33. *Housing for the Elderly*, Spring Meeting, ABA Section of Real Property Trust & Estate Law, New York, May 2012.
34. *Drafting the Uniform Power of Appointment Act*, Spring Meeting, ABA Section of Real Property Trust & Estate Law, New York, May 2012.
35. *Interjurisdictional Recognition of Life Planning Documents*, National Academy of Elder Law Attorneys 2012 Annual Meeting, Seattle, April 2012.
36. *Model Indian Probate Code*, Mid-Year Meeting, Inter-tribal Monitoring Association, Albuquerque, New Mexico, April 2012.
37. *Advanced Care Planning*, Webinar, Webinar, ABA Commission on Law and Aging, January 2012.
38. *Teaching Elder Law-What Works? What Doesn't?*, Annual Conference, Southeastern Association of Law Schools, Hilton Head, South Carolina, July 2011.
39. *Would the Uniform Law Commission Draft a Uniform Act on Elder Abuse*, Southeastern Association of Law Schools, Hilton Head, South Carolina, July 2011.
40. *Ethics in Elderlaw*, Webinar, ABA Commission on Law and Aging, July 2011.
41. *Impact of Recent Uniform Law Developments on Teaching Trusts and Estates*, Annual Conference, Southeastern Association of Law Schools, Palm beach, Florida, July 2010.
42. *Case Law Under the UTC, 2008-2010*, ALI-ABA Program on Representing Beneficiaries and Fiduciaries, Boston, July 2010; American College of Trust and Estate Counsel, June 2010.
43. *The Uniform Probate Code vs. AIPRA: A Comparison*, 2010 Sovereignty Symposium, Oklahoma City, June 2010.
44. *Recent Case Law on Special Needs Trusts*, National Academy of Elder Law Attorneys, New Orleans, February 2010.