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SPECIAL COUNSEL, BALSON & FAIX, LLP
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EDUCATION

J.D., University of Colorado School of Law, Boulder, Colorado, May 2001

- ●Casenote/Comment Editor (2000-2001), University of Colorado Law Review
- ●Associate Member (1999-2000), University of Colorado Law Review
- ●Recipient, Courtland H. Peterson Writing Award (Spring 2001)

B.A., Trinity University, San Antonio, Texas, *cum laude*, May 1988

- ●Philosophy/Legal Theory major; Spanish minor
- ●Universidad de Salamanca, Salamanca, Spain: Foreign study program 1986-87

PRESENTATIONS AND PUBLICATIONS

Things Fiduciaries Would Like Estate Planners to Do – Or Do Differently, Presenter, TRUST AND ESTATE SPRING UPDATE – 25 Minute T&E Talks on the Answers You Need to Know Now, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC. (March 2017).

Balancing Flexibility and Constraint in Trust Administration: Not Too Hot, Not Too Cold, But Just Right, Co-Presenter with Stephen Brainerd, Esq., Estate Planning Retreat, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC., (June 2014).

Duties, Pitfalls, and Ethical Concerns of a Lawyer Serving as Fiduciary: What You Need to Know (Advice for Architects from some Firemen), Co-Presenter with Daniel A. Rich, Esq., Estate Planning Retreat, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC., (June 2012 and at CLE in Denver, November 2012).

Coordinating Trusts, Estates and Protective Proceedings, Co-Presenter with Marcie McMinimee, Esq., Advanced Elder Law Institute, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC. (December 2010).

Counseling Clients on the Expanding Requirements of the Colorado Uniform Principal and Income Act and the Colorado Uniform Prudent Investor Act, Co-Presenter with Dennis Whitmer, Esq., COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC. (March 2010).

Tax Issues to Watch for in Elder Law, Presenter, Advanced Elder Law Institute, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC. (September 2008).

Introduction to Income Tax Issues, Presenter, Estate Administration: Basic Skills, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC. (March 2007).

HIPAA Ramifications for Estate Planners, Co-Presenter with Susan Fox Buchanan, Esq., Annual Estate Planning Update, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC. (November 2004).

IRC Section 754 and the Probate Practitioner, 36. COLO. LAW. 45 (Co-Author with Sanford Zisman, Esq.) (June 2007).

HIPAA Issues in Estate Planning, Chapter 34, COLORADO ESTATE PLANNING HANDBOOK, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC. (Co-Author with Susan Fox Buchanan, Esq.) (Supp. 2007).

Powers of Appointment, Chapter 18, COLORADO ESTATE PLANNING HANDBOOK, COLORADO BAR ASSOCIATION, CLE IN COLORADO, INC. (2004 and Supp. 2007).

Of Deckchairs, Icebergs and Gestalt Shifts, 72 U. COLO. L. REV. 851 (Spring 2001).

EMPLOYMENT

Feb. 2017 – present

Special Counsel, Balson & Faix, LLP
Estate Planning, Tax Planning, Estate and Trust Administration, Trust Consultations

2008 – 2016

Vice President and Trust Officer, Colorado State Bank and Trust
Trust and Estate Administration – from simple to very large and complex
●Managed a wide variety of complex estates and trusts (marital trusts, family trusts, dynasty trusts, directed trusts, trusts for elderly or incapacitated individuals, trusts for minors, trusts with large concentrations of real estate, oil & gas, closely-held stock, family business interests and unique assets)
●Administered custodial and investment accounts for individuals, individual trust and estate fiduciaries, and foundations;
●Collaborated extensively with trust & estate, tax, business and elder law attorneys, CPAs, financial planners, bankers and registered investment advisors to care for customers with a team approach

2001 – 2008

Attorney and Shareholder, Zisman Ingraham and Daniel, P.C., Denver
●Drafted wills, trusts, powers of attorney and ancillary documents; handled estate, gift, GST and income tax planning; engaged in business succession planning, and LLC and closely-held entity formation and maintenance; prepared complex estate, gift and generation-skipping tax returns

●Represented individual fiduciaries in the administration of decedents' estates and trusts; handled pre- and post-mortem income tax planning; coordinated administration with CPAs, financial planners, and investment advisors
●Researched complex trust and estate and tax legal issues; handled trust reformation proceedings and IRS audits; counseled clients regarding complicated probate and trust administration issues
●Supervised and trained paralegals

AFFILIATIONS AND PROFESSIONAL EXPERIENCE

Trust & Estate Section, Colorado Bar Association

●Chair (2016-2017)
●Active Member, Uniform Trust Code drafting subcommittee (2014 - present)
●Active Member, Statutory Revisions Committee (2003 – present)
●Member, Directed Trust statute drafting committee (2014-2016)
●Chair, Colorado Estate Planning Forms ("Orange Book") Committee (2003-2004)

University of Colorado School of Law

●Chair, Law Alumni Board (2017-2018)
●Adjunct Professor - will teach Wills & Trusts (2018-)
●Adjunct Professor – taught Estate Planning (2009-2011)
●Campaign Committee/Planned Giving Subcommittee Member (2014-2016)

Colorado Lawyer Board of Editors, Board Member (2013-2016)

Women's Estate Planning Council, Denver

●Current Member
●President (2010)

Childrens' Hospital Foundation of Colorado

●Planned Giving Committee Member (2008-2012)

Denver Estate Planning Council, Member
Rocky Mountain Estate Planning Council, Member
Colorado Women's Bar Association, Member

Bar Membership: American, Colorado, and Denver Bar Associations

Professional Licenses: Series 65

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