

# RANDI M. GRASSGREEN

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## **PROFESSIONAL EXPERIENCE**

- Crestone Capital Advisors, LLC, Boulder, Colorado  
Director of Family Wealth Planning, November 2008-Present  
Provides estate tax planning, income tax planning and philanthropic planning for a select nationwide group of 42 clients, who are primarily ultra high net worth individuals, families and foundations.
- Gelt & Grassgreen P.C., Shareholder, August 2001- November 2008
- Gorsuch Kirgis, LLP, Denver, Colorado, Associate Attorney, May 2000-August 2001
- Ernst & Young, LLP, Denver, Colorado, Tax Consulting Manager, August 1998-May 2000
- Ernst & Young, LLP, New York, New York, Senior Tax Consulting, October 1992-August 1995

## **EDUCATION**

- Juris Doctor, University of Colorado School of Law, 1998
- Masters of Taxation, University of North Carolina at Chapel Hill, 1992
- Bachelor of Science in Business Administration, University of North Carolina at Chapel Hill, 1992

## **MEMBERSHIPS**

- Colorado Bar Association (Sections of Taxation and Trusts & Estates)
- Denver Bar Association
- American Bar Association
- Rocky Mountain Estate Planning Council
- Boulder County Estate Planning Council
- Denver Estate Planning Council
- Women's Estate Planning Council of Colorado

## **TEACHING/PRESENTING EXPERIENCE**

- Unwinding "Bad" Estate Planning and Tax Transactions; Community Foundation; scheduled October 20, 2010
- Hot Tax Issues for the Business Attorney; 10<sup>th</sup> Annual Business Law Institute; Colorado Bar Association CLE; Denver, Colorado; November 6, 2009
- Adjunct Professor for Wills & Trusts at University of Colorado School of Law, Fall 2008
- Issues that Arise Upon the Death of a Majority Owner in a Closely Held/ Family Business; Colorado Bar Association CLE; Denver, Colorado; July 10, 2008
- Planning and Drafting Trusts in Light of Colorado's New Rule Against Perpetuities Statute; Colorado Bar Association CLE; Denver, Colorado; March 21, 2007 and Boulder County Bar Association; August 22, 2007
- Estate Planning Considerations for Estate, Gift and Generation Skipping Transfer Tax Purposes under the Economic Growth and Tax Relief Act of 2001; Centennial Estate Planning Council; Lakewood, Colorado; November 2001

## **COMMUNITY INVOLVEMENT**

- Partner in Social Venture Partners of Boulder County (October 2009-present)
- Boulder Valley Women's Health Center, Board Director and Finance Committee Member (December 2009 – present)
- Community Foundation of Boulder, Legal Committee Member (June 2009 – present)