Mary E. Vandenack Curriculum Vitae

Brief Biography

Mary E. Vandenack is founding and managing member of Vandenack Weaver LLC in Omaha, Nebraska. Mary is a highly regarded practitioner in the areas of tax, private wealth planning, high net worth estate planning, asset protection planning, executive compensation, equity fund development, real estate, benefits, business and business succession planning, tax dispute resolution, international tax, state and local tax, and tax-exempt entities. Mary's practice serves businesses and business owners, executives, real estate developers and investors, health care providers, companies in the financial industry, and tax-exempt organizations. Mary is a member of the American Bar Association Real Property Trust and Estate Section where she serves as Co-Chair of the Futures Task Force and Chair of the Technology and Economics of Law Practice Committee and Vice Chair of the Asset Protection Planning Committee. Mary is also a member of the American Bar Association Law Practice Division where she serves on the TechShow Board, as Editor-in-Chief of Law Practice Magazine and the Executive Council. Mary is also active in the American Bar Association Sections on Taxation and Business. Mary was the winner of the 2015 James I. Keane Memorial Award in recognition of e-lawyering and innovation and was named to ABA LTRC 2018 Distinguished Women of Legal Tech. Mary was highlighted in the September 2015 issue of Fortune Magazine as a Women Leader in the Law, is AV rated by Martindale Hubbell, and was included in Women Leaders in the Law in 2017 issues of American Lawyer, Corporate Counsel and the National Law Journal. Mary has been named to Lawyers of Executive Distinction and Best Lawyers in America. Mary is a frequent writer and speaker on tax, benefits, asset protection planning, and private wealth strategy planning topics as well as on law practice related topics including improving the delivery of legal services, technology in the practice of law, building sustainable law firms, and alternative fee structures.

Professional Positions

- Founding and Managing Member – Vandenack Weaver LLC – October 2005 to present.
    - Vandenack Weaver is a tax, business, real estate, trusts and estates boutique serving closely held businesses, their owners, professionals, and executives.
    - Practice Areas include Tax, Business, Trusts & Estates, Real Estate, Asset Protection Planning, Health Care and Tax-Exempt Entities
- Private Practice Lawyer – 1992 to 2005 – Tax, Business, Trusts and Estates, Health Care and Asset Protection Planning Attorney – Partner at Koley Jessen PC; Fitzgerald Schorr Barmettler & Brennan; Abrahams, Caslow & Cassman LLP; Vandenack Law Office PC.

Teaching Experience

- Creighton University School of Law – Legal Research and Writing 1995 – 1997
- Creighton University School of Law – "Legal Writing" – Instructor 1993-1994

- VTI Institute Paralegal Studies – Various semesters throughout the 1990s – Business Law; Legal Research; Legal Terminology
- Fitness Instruction since 2002 – yoga, pilates, spin and Bodypump
    - Yoga Alliance RYT
    - ACE Fitness Certified Group Fitness
    - AED/CPR/First Aid – since 2002

Educational Background

- Creighton University School of Law, Omaha, Nebraska, Magna Cum Laude
- College of Saint Mary, Omaha, Nebraska, Summa Cum Laude

Continuing Legal/Tax Education

- Federal Institute of Taxation, New York University, New York, New York: 2002, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019 with focus on partnership and real estate tax and structures; corporate tax; high net worth tax strategies and trusts and estates; international tax; state and local tax.
- Heckerling Tax Institute, Orlando, Florida: 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020.
- American Bar Association Real Property and Trust Spring Symposium: 2014, 2016, 2017, 2018, 2019.

Legal Publications

- "Planning to Sell a Closely Held Business" - Mary E. Vandenack, metroMAGAZINE December 2019
- "Planning: Life, Estate, Asset Protection, Business, Transition" - Mary E. Vandenack, metroMAGAZINE October 2019
- LISI Employee Benefits and Retirement Planning Newsletter #709 - (September 12, 2019)
- Commentary on the 11th Annual NYU Tax Controversy Forum - LISI Income Tax Planning Newsletter #182 (July 18, 2019)
- Commentary on the impact of the SECURE Act – LISI Employee Benefits and Retirement Planning Newsletter #707.(May 28, 2019)
- "Helping Lawyers Market Easily via Social Media", March/April 2019 *Law Practice Magazine*
- Commentary on *In the Matter of the Estate of Lois B. Erickson*, LISI Estate Planning Newsletter #2688 (December 6, 2018)
- "Sustainable Trusts and Estates and Real Property Practices", ABA *Probate & Property* November/December 2018
- "Leaving Big Law to Forge a New Path", ABA *Probate & Property* November/December 2018
- "Notes from the 77th Annual NYU Federal Institute of Taxation – Days 4-6" LISI Income Tax Planning Newsletter #160 (November 5, 2018) at http://www.leimbergservices.com.
- "Facilitating Effective Communication as a Leader", *Law Practice Magazine* November/December 2018 Issue
- "Notes from the 77th Annual NYU Federal Institute of Taxation – Days 1 -3" LISI Income Tax Planning Newsletter #159 (October 29, 2018)
- "Estate Planning Considerations Under Internal Revenue Code 199A", *metroMAGAZINE* October 2018
- "Building the Sustainable Real Property Trusts and Estates Practice", *Probate & Property* November/December 2018
- "The Impact of Tax Reform on Service Professionals", *metroMagazine* August 2018
- "The Sustainable Law Firm", *Law Practice Magazine* July/August 2018 issue

- "SEC's Proposed Rule Requiring a Customer Relationship Summary," LISI Employee Benefits & Retirement Planning Newsletter #696 (June 18, 2018)
- "The Impact of Tax Reform On Law Firms," Law Practice Today Magazine. (June 14, 2018)
- "SEC's Proposed Regulation Best Interest", LISI Employee Benefits & Retirement Planning Newsletter #695 (June 18, 2018)
- "The Impact of Tax Reform on Law Firms" – Law Practice e-zine (June 14, 2018)
- "SEC's Proposed Interpretation of Standard of Conduct for Investment Advisers," LISI Employee Benefits & Retirement Planning Newsletter #694 (June 5, 2018)
- "The Status of the Fiduciary Rule" – Summer 2018 *metroQuarterly*
- "Fifth Circuit's Vacating the Fiduciary Rule," LISI Employee Benefits and Retirement Planning Newsletter #690 (April 5, 2018)
- "Matter of Scottrade, Inc., Commonwealth of Massachusetts: Massachusetts' Effort to Enforce the Fiduciary Rule," LISI Employee Benefits & Retirement Planning Newsletter #689 (March 20, 2018).
- "Estate Plan Asset Coordination – Ensuring Your Testamentary Intention" - Spring 2018 *metroQuarterly*
- "Mindful Leadership," March/April 2018 *Law Practice Magazine*.
- "A Primer on Subpart F on the Internal Revenue Code: Taxation of U.S. Shareholders Owning Interests in Controlled Foreign Corporations," Coauthored with Monte Schatz Jan/Feb 2018 *The Nebraska Lawyer, Vol 21*
- "10 Ways the Tax Overhaul Could Hurt You," LISI Employee Benefits & Retirement Planning Newsletter #120 (December 11, 2017).
- "Final Regulation on Mortality Tables," LISI Employee Benefits & Retirement Planning Newsletter #684 (November 13, 2017).
- "Finding and Developing Effective Practice Group Leaders," Nov/Dec 2017 *Law Practice Magazine*.
- "McGaugh v. Commissioner: Seventh Circuit Finds No Taxable IRA Distribution Where Taxpayer Wired Funds to Purchase Stock IRA Custodian Refused to Accept," LISI Employee Benefits & Retirement Planning Newsletter #679 (August 7, 2017).

- "DNA Pro Ventures: IRS's Disqualification of ESOP Upheld by Tax Court and 8th Circuit," LISI Employee Benefits & Retirement Planning Newsletter #676 (June 21, 2017).
- "Trimmer v. Commissioner: Tax Court Allows Hardship Exception to 60-Day Rollover Requirement," LISI Employee Benefits & Retirement Planning Newsletter #675 (June 7, 2017).
- "Leading Through Change," July/August 2017 *Law Practice Magazine*.
- "Law Firm Growth: Key Considerations in Expansion," May/June 2017 *Law Practice Magazine*.
- "Saumer v. Cliffs Natural Resources Inc.," LISI Employee Benefits & Retirement Planning Newsletter #674 (May 3, 2017).
- "Wu vs. United States: 7th Circuit Holds Section 408(d)(4) Applies Only to Withdrawal of Contributions Made in a Taxable Year and Withdrawn No Later than the Due Date of the Taxpayer's Tax Return for that Taxable Year," LISI Employee Benefits & Retirement Planning Newsletter #671 (March 21, 2017) at http://www.leimbergservices.com Copyright 2017 Leimberg Information Services, Inc. (LISI).
- "Asset Protection Trusts," Spring 2017 *metroQuarterly*
- "Making Technology a Part of Law Firm Culture," March/April 2017 *Law Practice Magazine*
- "Tools & Techniques of Trust Planning," 17th Edition, Contributing Editor, Leimberg Library
- "Ensuring Your Law Firm Is on Course," Nov/Dec 2016 *Law Practice Magazine* Volume 42
- "Discounting Rules for Family Limited Partnerships Are Being Revised," Nov/Dec/Jan 2016/17 *metroQuarterly*

- "Assisting Clients with Gun Trusts" The Nebraska Lawyer, September/October 2016. The article was first published in the LISI Estate Planning Newsletter #2411 (May 3, 2016) at https://www.LeimbergServices.com. Copyright 2016 Mary E. Vandenack and Leimberg Information Services, Inc. (LISI). Reproduction in Any Form or Forwarding to Any Person Prohibited - Without Express Written Permission.
- "IRS Issues Final Regulations with Respect to How the Minimum Present Value Rules Apply to Defined Benefit Plan Distributions," by Mary E. Vandenack appears in the LISI Employee Benefits & Retirement Planning Newsletter #664 (September 27, 2016) at http://www.leimbergservices.com Copyright 2016 Leimberg Information Services, Inc. (LISI). Reproduction in Any Form or Forwarding to Any Person Prohibited – Without Express Permission.
- "Leading Innovation" July/August 2016 *Law Practice Magazine* Volume 42 No 4
- "Notice 2016-39: Recovery of Investment in the Contract from Payments Received from a Qualified Benefit Plan during Phased Retirement," by Mary E. Vandenack appears in the LISI Employee Benefits and Retirement Planning Newsletter #658 (June 29, 2016) at http:/www.LeimbergServices.com. Copyright 2016 Leimberg Information Services, Inc. (LISI). Reproduction in Any Form or Forwarding to Any Person Prohibited – Without Express Written Permission.
- "Mary Vandenack and Nicholas Meier: Assisting Clients with Gun Trusts," LISI Estate Planning Newsletter #2411 (May 3, 2016) at http://www.LeimbergServices.com Copyright 2016 Leimberg Information Services, Inc. (LISI)
- "Keeping your Estate Planning Up To Date," May/Jun/Jul 2016 *metroQuarterly*
- An AALU Washington Report, WRNewswire 16.04.29:   Published by the Association for Advanced Life Underwriting® as part of the Essential Wisdom Series, topic: Tax Court Decides Purported Section 419(e) Plan is Both Deferred Compensation and Split-Dollar
- "IRS Withdraws Proposed Regulations Affecting Nondiscrimination Requirements for Qualified Plans," LISI Employee Benefits and Retirement Planning Newsletter #657 (April 25, 2016) at http://www.LeimbergServices.com ©Mary E. Vandenack and Leimberg Information Services, Inc.
- "Leading Technological Change in Your Firm," March/April 2016 *Law Practice Magazine* Volume 45
- "To Cloud or Not To Cloud?," March/April 2016 *Law Practice Magazine* Volume 45
- "Directed Trusts for Special Situations," Feb/Mar/Apr 2016 *metroQUARTERLY*
- "The ABA Commission on the Future of Legal Services," Jan/Feb 2016 *Law Practice Magazine* Volume 42 Number 1
- "Charitable Giving Strategies to Benefit Charity and Get a Tax Deduction," Feb/Mar/Apr 2015 *metroQUARTERLY*
- "Caring for a Disabled Beneficiary: Third-Party Special Needs Trust," Nov/Dec/Jan 2014/15 *metroQUARTERLY*
- "Mary Vandenack & Dan Wintz: Drafting Considerations for the Third-Party Spendthrift Trust after In re Castellano," LISI Asset Protection Planning Newsletter #259 (September 10,2014) at http://www.LeimbergServices.com Copyright 2014 Leimberg Information Services, Inc. (LISI).
- "Estate Planning With IRAs: Inherited IRAs Are Not Protected From Creditors," Aug/Sept/Oct 2014 *metroQUARTERLY*
- "Mary E. Vandenack: Reconsidering the Design of Trusts Used as IRA and Qualified Account Beneficiaries Post-Clark," LISI Asset Protection Planning Newsletter #252 (July 7, 2014) at http://www.LeimbergServices.com ©Mary E. Vandenack 2014.
- "Mary Vandenack & Assisting Clients in Avoiding Potential Creditors: What Actions Can an Attorney Take?" LISI Asset Protection Planning Newsletter #246 (June 9, 2014) at http://www.LeimbergServices.com ©Mary E. Vandenack 2014.

- "Hiring a Marketing Director for Small or Midsized Firms," May/June 2014 *Law Practice Magazine*, Volume 40 Number 3
- "Protecting Your Rights to Intellectual Property," May 2014 *metroMAGAZINE*
- "Protecting Your Intellectual Property," Coauthored with Joshua A. Diveley, March 2014
- "Pros & Cons of Portability in Estate Planning," March 2014 *metroMAGAZINE*
- "Tax Planning for Real Estate Investors and Professionals Considering the Net Investment Income Tax and Additional Self Employment Tax," January 2014 *metroMAGAZINE*
- "2013 Year End Tax Planning," November 2013 *metroMAGAZINE*
- "Preventing Theft and Fraud Within Your Law Firm," September/October 2013 *Law Practice Magazine*, Volume 39 Number 5
- "Who Are Your Children & Descendants? Your Will in a Time of Unique Parental Situations," September 2013 *metroMAGAZINE*
- "Venture Capital Investments in Legal Services," July/August 2013 *Law Practice Magazine*, Volume 39 Number 4
- "Business Fraud and Theft Prevention," July 2013 *metroMAGAZINE*
- "Gun Trusts: For Gun Owners or Those Considering Purchasing a Gun," May 2013 *metroMAGAZINE*
- "Estate Planning After 'ATRA,'" March 2013 *metroMAGAZINE*
- "New Medicare Tax Applies in 2013: Strategies for Minimizing the Cost," January 2013 *metroMAGAZINE*
- "Making the Decision To Make a Change," January/February 2013 *Law Practice Magazine,* Volume 39 Number 1
- "Dawn of a New Business Model. What Morningstar teaches us about law firm management," January/February 2013 *Law Practice Magazine*, Volume 39 Number 1
- "Building on Key Capital: Your Current Clients," November/December 2012 *Law Practice Magazine*, Volume 38 Number 6
- "Asset Protection Planning Trusts," January 2012 *metroMAGAZINE*
- "Year End Tax Planning Tips," November 2011 *metroMAGAZINE*
- "Estate Planning Under the Tax Relief Act of 2010," March 2011 *metroMAGAZINE*
- "The Mini Private Foundation," January/February 2011 *metroMAGAZINE*
- "Another New Tax Act: Small Business Jobs Act of 2010," November 2010 *metroMAGAZINE*
- "Your Will if You Have No Will," September 2010 *metroMAGAZINE*
- "Advance Directives Options in Nebraska," July 2010 *metroMAGAZINE*
- "Health Care Reform and You," May 2010 *metroMAGAZINE*
- "Insuring a Key Asset: Your Stream of Income," March 2010 *metroMAGAZINE*
- "Year-end Tax Thoughts: Estate Planning," November 2009 *metroMAGAZINE*
- "Asset Protection," September 2009 *metroMAGAZINE*
- "American Recovery & Reinvestment Act of 2009," May 2009 *metroMAGAZINE*
- "Estate Planning During Economic & Tax Uncertainty," January 2009 *metroMAGAZINE*
- "Estate Planning Basics," November 2008 *metroMAGAZINE*
- "The Family Foundation for Charitable Giving," September 2008 *metroMAGAZINE*
- "Planning for the Disabled Beneficiary: The Special Needs Estate Plan," October 2008 *metroMAGAZINE*
- "Employer-Provided Autos Can Benefit Employers," 23 *Taxation for Lawyers* 137 (1994).
- "The Entertainment Facility Rules of Section 274 and Corporate-Owned Condominiums," 9 *Akron Law Review* 1 (1992).
- Casenote: "Holland v. Illinois, The Impartiality Requirement of the Sixth Amendment and Peremptory Challenges," 25 *Creighton Law Review* 313 (1990).

Speaking Engagements, Presentations, and Instruction

- Moderator/Presenter – January 28, 2020 – Best of ABA TECHSHOW Webinar – Ready for Process Automation? Start by Developing Checklists and Maps.
- Moderator - October 17, 2019 - Avoiding Employment Litigation webinar series
- Speaker - May 14, 2019 - "The Future of Estate Planning Practice" - Webinar for Purposeful Planning Institute
- Speaker/Presenter – May 3, 2019 – "50 Lessons for Women Lawyers" – New York State Bar Association
- Speaker/Presenter – April 16, 2019 – "Preserving Client Testamentary Intent" – Presentation at Omaha Estate Planning Council Breakfast Meeting
- Speaker/Presenter – March 28, 2019 – "Avoiding Erosion of Testamentary Intent via Contractual Designation" – Presentation at the Society of Financial Service Professionals March 2019 Breakfast Meeting
- Co-Presenter – March 7, 2019 – "Using Tech to Improve and Grow Your Estate Planning Practice – Part 2" – Webinar with Martin Shenkman
- Speaker/Presenter – February 28, 2019 – "Process Automation Phase One: Developing Checklists and Maps" – ABA Techshow 2019 Presentation
- Speaker/Presenter – February 28, 2019 – "Next Generation Technology for the Solo and Small Firm" – ABA Techshow 2019 Presentation
- Speaker/Presenter – February 27, 2019 – "Designing the Law Firm of the Future: Diversity, Inclusion, Technology, and Innovation" – Women of Legal Tech Presentation
- Presenter – January 29, 2019 – "Using Tech to Grow Your Estate Planning Practice" - Webinar
- Speaker/Presenter – December 2018 –"Profitable Alternative Fees for the Process Oriented Lawyer" - OBA End of the Year CLE Presented by OBA Lawyer Referral Service
- Speaker/Presenter – September 2018 – ABA Presentation "Future Proofing Your Law Firm"
- Presenter/Panelist – September 13, 2018 - ABA Webinar: CE1809SFP Affordable Technology for Solo and Small Firm Productivity
- Co-Speaker – July 10, 2018 – "Understanding What the 2017 Tax Reform Means to Your Firm" – Webinar for the Massachusetts Bar Association
- Speaker – ABA RPTE Symposium – May 2018 - "Moving? Can I Take It with Me? Can I Use Something New? State Law Exemptions Under the Microscope"
- Moderator – ABA RPTE COP Program – May 2018 – "Essential Lawyering Skills for Today"
- Speaker – ABA Webinar – April 2018 – "Understanding What Tax Reform Means For You – 199A"
- Speaker – Law Talk Network – April 2018 – "Technology for the Small and Solo Firm"
- Speaker – Creighton University School of Law Trusts & Estates Class – April 2018 – "Gun Trusts"
- Speaker – ABA Techshow 2018 – March 2018 – "Affordable Technology for the Solo and Small Firm"
- Speaker – ABA Techshow 2018 – March 2018 – "Alternative Fees for the Process Oriented Law Firm"
- Speaker – ABA Techshow 2018 – March 2018 – "Mindful Leadership for Innovation and Technology"
- Speaker – Lawpact Futures Conference – November 2017 – "The Future of Legal Services"
- Speaker – ABA RPTE Symposium – April 2017 – "Contract Based Wealth Transfers & Erosion of Testamentary Intent"
- Speaker – ABA Techshow 2017; "When Law Firms Merge"; "Panel Presentation: Future of Legal Services"; "Facilitator Trusts and Estates Community"; "Yoga for Technologists"; "Mindful Meditation"
- Speaker – "Alternative Fee Arrangements" for ABA RPTE Non-Tax Issues Committee Teleconference February 2017
- Speaker – "Analysis of the ABA Report on the Future of Legal Services" Podcast, Jim Calloway's Law Practice Tips Blog October 2016

- Speaker – "Small Firms/Big Markets" Omaha Legal Professionals Association October 2016
- Speaker – "Implementing Alternative Billing in your Law Practice" Legal Talk Network, New Solo Podcast October 2016
- Speaker – "Small Firms/Big Markets" ISA and NSA Solo and Small Firm Conference August 2016
- Speaker – "Alternative Fees: Making Them Profitable" ISA and NSA Solo and Small Firm Conference August 2016
- Speaker – "Small Firms/Big Markets" ABA Techshow, March 2016
- Speaker – "How to Compete with IBM Watson JD: Future-proof your practice by improving efficiency
- now – Part 1" ABA Law Practice January 2016
- Speaker – "Business Succession Planning – Omaha Network January 2016
- Speaker – "Technology in Law Practice: The Good, the Bad, and the Ugly" Omaha Bar Assn Dec 2015
- Speaker – "Estate Planning for Farmers" Hertz Management November 2015
- Speaker – Future of Legal Services Panel, ABA Law Practice Spring Meeting June 2015
- Speaker – "How to Have a Full Plate in Life without dropping anything off" College of Saint Mary Honor Student Program January 2015
- Speaker – "Legal Issues for Businesses," Midlands National Management Association, May 2008
- Speaker – "Medical Records Guide," Medical Group Presentations, 2008
- Speaker – "Charitable Giving Considerations," Charitable Organization Presentations, 2005
- Speaker – "Estate Planning Guide," – Medical Group Presentations, 2005
- Speaker - "Retirement Plan Design Considerations," Firm Seminar, 2004
- Speaker - "Estate Planning for Farm Assets," Hertz Farm Management, Fall 2003
- Speaker – "HIPAA Basics," Medical Group Presentations, 2003
- Speaker - "Estate Planning Considerations," Saint Stephen the Martyr Catholic Church, Spring 2003
- Speaker - "Estate Planning In Changing Times," Archdiocese of Omaha, Fall 2002
- Speaker - "Charitable Giving Strategies," Wahoo Neumann Schools, Fall 2001

Other Publications

- "The Power of Our Words: Kind and Encouraging Words can Change Lives" – Mary E. Vandenack, metroMagazine December 2019
- "Make the First Appointment of the Day with Yourself" - Mary E. Vandenack , metroMAGAZINE October 2019
- "50 Lessons for Women Lawyers - From Women Lawyers: Career and Life Lessons From 50 Successful Women Lawyers", May 2019
- "Building Resilience", *metroMAGAZINE* April 2019
- "Modern Mindfulness vs Digital Detox," *metroMAGAZINE* February 2019
- "Tips for Being a Peacemaker", *metroMAGAZINE* December 2018
- "Emotional Intelligence", *metroMAGAZINE* October 2018
- "Practicing Gratitude", *metro*QUARTERLY August 2018
- "Practicing Mindfulness to Enhance Leadership Skills" – Summer 2018 *metro*QUARTERLY
- "Authentic Friendships" – Spring 2018 *metroQUARTERLY*
- "Filling our Life with Healing Friends and Safe People" Nov/Dec/Jan 2018 *metroQUARTERLY*
- "Peaceful, Safe, Caring Relationships" Aug/Sept/Oct 2017 *metroQUARTERLY*
- "A Good Time to Remember Kindness," May/June/July 2017 *metroQUARTERLY*
- "Finding Ways to Inspire Others to Positive Action," Feb/March/April 2017 *metroQUARTERLY*
- "Update: Mindfulness Revisited," Nov/Dec/Jan 2017 *metroQUARTERLY*

- *"*Eating Clean: Healthier Options" Aug/Sept/Oct 2016 *metroQUARTERLY*
- "Mindful Eating: Summer Fresh" May/Jun/Jul 2016 *metroQUARTERLY*
- "Mindfulness: Tips for Beginning" Feb/March/April 2016 metroQUARTERLY
- "Mindfulness: Just the Beginning," Nov/Dec/Jan 2015/16 *metroQUARTERLY*
- "Self Compassion: Embracing Our Humanity," Aug/Sept/Oct 2015 *metroQUARTERLY*
- "Health Thoughts to Keep Omaha Thriving," Feb/Mar/Apr 2015 *metroQUARTERLY*
- "Making a Difference for Those With Mental Health & Substance Abuse Issues," Nov/Dec/Jan Winter 2014 *metroQUARTERLY*
- "Tips for Practicing Compassion", Aug/ Sept/Oct 2014 *metroQUARTERLY*
- "Tips for Being More Positive," June 2014 *metroMAGAZINE*
- "Spring Cleanse for the Mind," May 2014 *metroMAGAZINE*
- "Saying 'Yes' With Impact and 'No' More Frequently," April 2014 *metroMAGAZINE*
- "Renew Your Vitality – Celebrating Spring," March 2014 *metroMAGAZINE*
- "Practicing Loving Kindness," February 2014 *metroMAGAZINE*
- "Making a Difference in 2014," January 2014 *metroMAGAZINE*
- "'Tis the Season for Family, Friends, Kindness, Gratitude and Appreciation," December 2013 *metroMAGAZINE*
- "Thriving Through the Holidays," November 2013 *metroMAGAZINE*
- "A Healthy Holiday Plan: Creating the Extraordinary," October 2013 *metroMAGAZINE*
- "A Candy Bar Is Not a Treat…Being Healthy Is," September 2013 *metroMAGAZINE*
- "Breaking the Sugar Habit," August 2013 *metroMAGAZINE*
- "Developing the Whole-food Habit," July 2013 *metroMAGAZINE*
- "High Vibration Foods: Eating for Health," June 2013 *metroMAGAZINE*
- "Spring Renewal," May 2013 *metroMAGAZINE*
- "Support Systems Matter: Check in on Yours," April 2013 *metroMAGAZINE*
- "Helping Others Help You," March 2013 *metroMAGAZINE*
- "Creating More Love in Your Life," February 2013 *metroMAGAZINE*
- "2013: Renewal Resolutions," January 2013 *metroMAGAZINE*
- "Tapas: Energy of Change," October 2011 *metroMAGAZINE*
- "Santosha: Contentment," September 2011 *metroMAGAZINE*
- "Saucha: How We Treat Ourselves," August 2011 *metroMAGAZINE*
- "Aparigraha: Letting Go," July 2011 *metroMAGAZINE*
- "Asteya: Balancing Energy," June 2011 *metroMAGAZINE*
- "Satya: Truthfulness," May 2011 *metroMAGAZINE*
- "Wellness Adventure: Create a Wellness Adventure in Your Life This Spring," April 2011 *metroMAGAZINE*
- "Ahimsa: Non-violence," March 2011 *metroMAGAZINE*
- "Living Single," January/February 2011 *metroMAGAZINE*
- "Loving Kindness," December 2010 *metroMAGAZINE*
- "The Season of Gratitude," November 2010 *metroMAGAZINE*
- "The Center of the Circle," October 2010 *metroMAGAZINE*
- "My Life Is My Artwork," September 2010 *metroMAGAZINE*
- "The Tastes of Food," August 2010 *metroMAGAZINE*
- "Walk It Off, " July 2010 *metroMAGAZINE*
- "The Food Meditation," June 2010 *metroMAGAZINE*
- "New Life," May 2010 *metroMAGAZINE*
- "Yoga As the Antidote to Being Stuck," April 2010 *metroMAGAZINE*

- "Food Rules for Spring," March 2010 *metroMAGAZINE*
- "Love Is a Verb," February 2010 *metroMAGAZINE*
- "Meta-Commitments," January 2010 *metroMAGAZINE*
- "A Holiday Gift to Consider for Yourself," December 2009 *metroMAGAZINE*
- "Rethinking the Term 'Treat'," November 2009 *metroMAGAZINE*
- "Pilates: Change the Way You Move and Live," October 2009 *metroMAGAZINE*
- "Top 10 Fall Vegetables," September 2009 *metroMAGAZINE*
- "Joy in Daily Living: Connecting With Your Own Soul," August 2009 *metroMAGAZINE*
- "Turning Resolutions Into Reality," December 2008 *metroMAGAZINE*

Editorial Roles

- Law Practice Magazine
    - Editor-in-Chief, 2018 - present
    - Features Editor, 2013-2016
    - Assistant Features Editor, 2012-2013
    - Editorial Board, 2011-present
- Nebraska Lawyer - Issue Editor, various times
- Creighton Law Review - Editor in Chief, 1992

Community Associations, Board Service

- Boystown Advisory Board, March 2017-present
- Creighton University Law School Advisory Board, May 2017 to present
- Member, Creighton University Mentoring Program
- TABS Board, 2012 to present
- American Heart Association
    - Circle of Red, 2011-present – Executive Distinction
    - Executive Committee, Go Red For Women, 2012-2014
- SAC Federal Credit Union
    - Supervisory Committee and Budget Committee, March 2017-May 2018
- Omaha Chamber of Commerce
    - BOSS Group, 2010-present
    - Health Care Council
- Omaha Network, 2011-present
- Hope Lodge Mission Advancement Council, 2011–2017
- Nebraska Cancer Coalition Board of Directors, 2010–2016
- Armbrust YMCA
    - Board of Directors, 2008–2012
    - Chair, Strong Kids Campaign, 2008
- Wellbound Fitness Advisory Board, 2004-2006
- New Cassel Retirement Center Finance Committee, 2002-2004
- Saint Stephen the Martyr
    - Development Campaign Leader, 2002
    - Finance Board, 1994-2004
- American Council on Exercise, 2000-present
- Yoga Alliance – 300 hour RYTE, 2008-present

- Executive Women's Golf Association – Executive Distinction
- Jaybackers, 1993-present
- Millard Business Association, 2005-2017
- Omaha Women's Fund
- Former Member Rotary International, Suburban Chapter
- The Touchdown Club, 1992-present

Professional Associations, Memberships, and Activities

- American Bar Association
  - ABA SCOTIS 2018 - present
  - ABA Commission on the Future of Law Practice 2014 – 2016
  - ABA Commission on Youth at Risk, 2013-2016
  - American Bar Association Foundation – Fellow, 2014 to present
  - ABA Law Practice Division
    - Executive Council 2014 to present
    - *Law Practice Magazine* Senior Editorial Board –2011 to present
      - Vice Chair 2013-2014
      - Chair 2018 to 2020
    - Women Rainmakers – Board of Directors, 2011-present
    - Author – Law Practice Magazine Leadership Column – 2016 to present
    - Evolving Business Models Task Force, 2014-2015
    - Resolutions Committee – Vice Chair, 2014-2015
    - Futures Initiative – Vice Chair 2015-16
  - ABA Real Property Trusts & Estates Section
    - Joint Law Practice Management Group – Group Co-Chair 2018 to present
    - Futures Task Force - Co-Chair 2016-2019
    - ABA RPTE Small Firms Committee - Vice Chair, 2015-2019
    - ABA RTPE Economics of Practice & Technology – Chair 2016-2019
    - Planning Committee
    - Asset Protection Planning Committee – Vice Chair 2018
    - Council - Trust and Estate Division Assistant Secretary 2019
  - ABA Sections on Taxation, Business Law, International Law, Health Care Law
- Nebraska State Bar Association
  - Foundation Fellow, 2015
  - Member of Sections on Real Property, Trust and Probate Law, and Business Law
  - Lawyers' Assistance Implementation Committee
  - Publications Committee
  - Chaired Women and the Law Section
  - Previous Officer of Business Law Section
- Michigan Bar Association
- Omaha Estate Planning Council
- Omaha Bar Association
  - Medical/Legal Committee, 2004-2005
  - Domestic Violence Committee, 2003-2005
- American Health Lawyers Association
- Medical Group Management

- Scribes: The American Society of Legal Writers
- Health Care Compliance Association
- Chair, Nebraska Women's Bar Association, 2002
- Alpha Sigma Nu Jesuit Honor Society
- Phi Delta Phi Legal Fraternity

Bar Admissions/Courts

- Nebraska, 1992
- U. S. District Court, District of Nebraska, 1992
- Michigan, 2007
- U.S. Court of Appeals, Seventh Circuit, 2016
- U.S. Court of Appeals, Eighth Circuit, 2016
- U.S. Tax Court, 2016

Honors and Features

- Selected for recognition in the 2019 25th Edition of *The Best Lawyers in America*© for work in Trusts and Estates.
- Chartered Advisor in Philanthropy®, February 2019
- Identified as a resource for The Well-Being Toolkit for Lawyers & Legal Employers, which released in July 2018.
- Best Lawyers in America 2019
- Best Lawyers in America 2018 – Omaha Magazine, March/April 2018
- 2018 AIOLC's 10 Best in Nebraska for Client Satisfaction, The Estate Planning Division – The American Institute of Legal Counsel, December 2018
- ABA LTRC Distinguished Women of Legal Tech 2018
- SmallLaw's Pick of the Week Award for the article, "The Impact of Tax Reform On Law Firms", July 2018
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- College of Law Practice Management – Inducted 2017
- Lawyers of Executive Distinction – Trusts & Estates – Lawyers of Distinction, June 2017
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- 2017 Top Rated Lawyers, *National Law Journal*, March 2017
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- Martindale Hubbell AV Rating
- Nebraska Cancer Coalition Partnership Award 2016
- Featured in Fortune Magazine "Women in Law," September 15, 2015 *Fortune Magazine*.
- James Keane Memorial Award March 2015 presented by American Bar Association Law Practice Division for innovation in technology in the practice of law.
- Featured in: "You Know What They Say: If You Want Something Done, Ask a Busy Person," Interview with Omaha Daily Record, September 5, 2014.
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