Council of the Trust and Estate Section of the Colorado Bar Association
Notice of and Agenda for the November 2, 2022, Meeting

To: Council Members
Trust and Estate Section of the Colorado Bar Association

From: Dylan Metzner
Secretary/Treasurer
1675 Broadway, 26th Floor
Denver, CO 80202
(303) 785-1632
dmetzner@joneskeller.com

Notice of Meeting

The next monthly meeting of the 2022-2023 Council of the Trust and Estate Section of the Colorado Bar Association will be held:

Date and time: ***Thursday, November 2, 2022, 3:15 p.m.***

Place: 1290 Broadway, Suite 1700, Denver, CO 80203 Room West 1
or Call-In/Zoom

https://cba-cle.zoom.us/j/83843741966?pwd=NXVOTEExdUxuQ0FrV0VXV3ZrU3hVQT09

Meeting ID: 838 4374 1966
Passcode: 534100
Call-in: 16694449171

Minutes of Previous Meetings & Attachments

1. Minutes of the October 6, 2022 meeting of the Council
2. Executive Council First Year Vacancy Application Packets (Listed in Order Submitted)
   a. Bridgers, Griffin
   b. Boda, Teagan
   c. Schmidt, Chris
   d. Hutchins, Donald
   e. Edwards, Margot
   f. Howard, Elizabeth
   g. Bopp, Jesse
3. September 30, 2022 Financial Statements
4. Memorandum regarding the October 18, 2022 CBA Real Estate Section Council Meeting

Trust and Estate Section Council Agenda
November 2, 2022

In an attempt to adhere to the allotted meeting duration of one (1) hour and thirty (30) minutes, the Chair will exercise his/her prerogative to limit the time for any report or discussion on a topic to ten (10) minutes. This conforms to Robert's Rules of Order.

1. Review/approval of Minutes of the October 6, 2022 meeting of the Council

2. Succession Items re: Council Member Vacancy, Committee Chair; Liaisons and Representative

    a. Vacancy- Executive Council First Year Member

    b. Succession Planning- Legislative Liaison

    c. Discussion- re Possible Creation of Liaison to ADR Section

3. Chair's Report and Administrative Matters (Molly Zwerdlinger)

4. Secretary/Treasurer's report (Dylan Metzner)

5. Tax Section Liaison (Aaron Burton)

6. Elder Law Section (Patrick Thiessen)

7. Real Estate Section Liaison (Chad Rounds)

8. Family Law Section Liaison (Kim Willoughby)

9. Statutory Revisions Committee (Jonathan Haskell)

10. Legislative Liaison (Steve Brainerd)

11. Legislative Update (Tyler Mounsey)

12. Council Notes (Kristin Dittus)

13. CLE/Estate Planning Retreat (Lauren da Cunha)

14. Orange Book Forms Committee (Rikke Liska)
15. Supreme Court's Rules and Forms Committee (Leia Ursury)
16. Civic and Community Affairs Joint Committee of the Elder Law Section (Sandra Sigler)
17. Equity, Diversity, and Inclusivity Committee (Amber Marchlowska)
18. Probate Trial and Procedures Committee (Marcie McMinimee & Lindsay Andrew)
19. Colorado Estate Planning Handbook (David Johns)
20. Green Book (Josie Faix)
21. Trust & Estate Practice Support Committee (Margrit Parker)
22. The Colorado Lawyer (Emily Bowman & David Kirch)
23. Communications Representative/Ambassador Program (Kayla Nelson)
24. Board of Governors Representative (Jonathan Haskell)
25. Miscellaneous/FYI
26. Adjournment

Council of the Trust and Estate Section of the Colorado Bar Association
Minutes of the October 6, 2022, Meeting

Council met on Thursday, October 6, 2022 via audio-conference. The meeting was called to order at approximately 3:20 p.m. by Molly Zwerdlinger, Chair.

The following members of Council participated by Zoom/phone or in-person and constituted a quorum:

In attendance were:

Molly Zwerdlinger, Chair
Lauren da Cunha, Vice Chair
Dylan Metzner, Secretary/Treasurer Molly
Lindsay Andrew (1st year member)
Kelianne Chamberlain (1st year member)
Tim Bounds, (Immediate Past Chair)

Also in attendance were:
Emma Baxter, CBA Staff
Amber Marchlowska
Rikke Liska
Chad Rounds
Jonathan Haskell
Kayla Nelson
Margrit Parker

1. **Review/approval of September 7, 2022 Minutes.**

   - The draft of the September 7, 2022 contained an error in the title, which referenced August 3rd instead of September 7th. That error was corrected and the corrected September 7, 2022 minutes were approved unanimously.

2. **Succession Items re: Council Member Vacancy, Committee Chair, Liaisons and Representatives**

   a. **Vacancy- Executive Council First Year Member**.
   Applications are being taken through October 28, 2022. Council will review all applications received and select an applicant to fill the vacancy during the November meeting.

   b. **Succession Planning- Legislative Liaison**.
   No report.

c. **Succession Planning- Trust & Estate Practice Support Committee**
Margrit Parker has succeeded Jessica Hazleton as Chair of the TEPS Committee. The Committee is working on creating a succession structure with the goal that there will always be a successor chair identified.

d. **Appointment- Communications Representative/Ambassador Program**
Kyla Nelson is now serving as representative.

e. **Discussion- re Possible Creation of Liaison to ADR Section**
Council discussed the possibility of Judge Stewart either filling this role or recommending someone who could fill this Role. Tim and Molly will reach out to Judge Stewart.

3. **Chair's Report and Administrative Matters (Molly Zwerdlinger)**

Encouraging In-Person Attendance on Probate Days (aka Wonderful Wednesday). Breakfast and Lunch Buffets resumed in September and will continue. Council discussed the possibility of organizing a happy hour to occur after Executive Council's meeting. Council will message to the Section that Probate Days will remain hybrid with both in-person and virtual options but that Members are encouraged to attend in person and there will be a happy hour organized for January's Probate Day.

Orange Book Committee has been experiencing technical difficulties with hybrid meetings. Specifically, those who are attending virtually are having a difficult time hearing or participating with those attending in person. Council will monitor this concern but this may be a larger IT issue that needs to be addressed and resolved by the CBA as an organization rather than the T&E Section.

4. **Secretary/Treasurer's report (Dylan Metzner)**

Dylan Metzner reported that financials are in good shape and we have a larger balance then we did this time last year. Council discussed that there was a time in the not too distant past where the Section did not have much money in the Account. Dylan will review the financials from previous years. Council discussed the possibility of establishing setting a minimum amount to keep in the account for unexpected expenses or dips in revenue. Dylan will review financials over the past few years and report back to Council.

EDI Committee requested that that the T&E Section allocate $1,250 to co-sponsor with Elder Law a table at the LGTBQ Sections Dinner. This request is discussed in detail below in the EDI Committee report. Motion was duly made and seconded to honor EDI's request. Motion passed unanimously.

Dylan Metzner reported that the Sterling Ambler Dinner will occur on November 2nd. After contacting various venues Dylan suggests securing Quality Italian. The pricing is higher than last year's pricing, which is not surprising due to inflationary pressures. Dylan anticipates that cost per guest will be under 180.00. Dylan motioned that Council approve charging guests $60 per guest to attend and that Council authorize up to $6,500 to be allocated to cover expenses that exceed the $60 per guest collected.

5. Tax Section Liaison (Aaron Burton)
No report

6. Elder Law Section (Patrick Thiessen)

A working group is coming together on the Estate of Davies case to explore a possible amicus brief to the Colorado Supreme Court (assuming cert is granted) on behalf of the Elder Law Section of the CBA. As a brief reminder, this is the case involving CRS 15-14-411, a conservator appointed for a testator, and what falls within the definition of a conservator "made" will. We are tentatively planning our first meeting via Zoom for 10:00 a.m. next Friday, October 7th. Please email Patrick or Scott Challinor, scott@conoverlawllc.com if interested in being added to this group and/or wish to participate.

Elder Law Retreat will be August 24 through 26, 2023 in Vail. The Office of Public Guardianship is looking for a person interested in serving as a commissioner. Please email me with questions/interest.

No executive meeting today.

7. Real Estate Section Liaison (Chad Rounds)

Real Estate Section matched our Section's donation of $1,000 to Resolution Core program.

8. Family Law Section Liaison (Kim Willoughby)
No report.

9. Statutory Revisions Committee (Jonathan Haskell)

Motion duly made and seconded to Approve SRC's Recommended Changes to CRS §15-10-305.5 (Lodged Wills) passed unanimously.

Council will pass the recommended changes to Tyler Mounsey to take to LPC.

10. Legislative Liaison (Steve Brainerd)
No report

11. Legislative Update (Tyler Mounsey)
No report

12. Council Notes (Kristin Dittus)
No report

13. CLE/Estate Planning Retreat (Lauren da Cunha)
Good response for topics for retreat. 13 people have responded with topics and speakers. Committee will be receiving proposals through the end of October.

Committee is looking concretely at having childcare at retreat. Committee is going to try to find a sponsor for childcare and may come to Council to ask for additional funding, which would be in addition to their regular request for funding.

14. Orange Book Forms Committee (Rikke Liska)
Subcommittee formed for same sex marriage savings clause to account for possibility that law may change where same sex marriages are not recognized.

15. Supreme Court's Rules and Forms Committee (Leia Ursury)
No report

16. Civic and Community Affairs Joint Committee of the Elder Law Section (Sandra Sigler)
Kayla Nelson reported that the Joint Committee is starting to ask for sponsorships for the handbook. Sponsorships need to be in by February 14, 2023. Reach out to Kayla for more information. Boulder and El Paso had their Senior Law Days in September. Virtual series is being put on by Colorado legal services putting on presentations.

Motion duly made and seconded to approve Joint Committee's suggested revisions to Probate in Colorado Brochure. Motion passed unanimously.

17. Equity, Diversity, and Inclusivity Committee (Amber Marchlowska)
EDI working on three initiatives
- CLE committee to come up with diverse topics
- Student Ambassador to have student liaison with group

- Working on supporting other minority bar associations buy purchasing tables at their events
  - Goal is to build relationships with other diverse sections.

    EDI requested that the T&E Section Co-Sponsor a Table with the Elder Law Section at the LGBTQ Sections Dinner. Elder Law Section committed to $1,250 (which is half of the cost of a sponsorship).

    Discussion was had and it was confirmed that the Sponsorship would be from Elder Law and Trust and Estate Section each having paid $1,250.

In addition to the law student liaison, EDI is working on establishing 2 annual events at DU. The Spring event would be a practitioner lunch at the school and the fall event would be a happy hour.

18. Probate Trial and Procedures Committee (Marcie McMinimee & Lindsay Andrew)

Small attendance at meeting. Focus was on the probate bench book, which has been finalized. Judges are not allowing practitioners to see it. Committee is exploring what it would take to get the Probate Bench Book published. The CBA director of publications indicated publication would be a 2-year commitment. A Group of lawyers would need to commit to serve on sub-committee to review and work on publication.

PT&P Committee will revisit this next month. Committee will talk with probate judges as to whether the bench would oppose publication if the Bar was able to form a sub-committee.

19. Colorado Estate Planning Handbook (David Johns)

No report

20. Green Book (Josie Faix)

No report

21. Trust & Estate Practice Support Committee (Margrit Parker)

Committee has 70 people on the email list and roughly 12 people attend monthly, with most attending virtually. Committee Chair is hoping to have more in-person attendance in the coming months and believes a Section Happy Hour after Probate Day meetings may assist.

Carl Gladstein presented last month, Mark Masters is presenting this month and there will be a presentation next month on drafting for retirement plan.

Committee would like to have live presenters and other established members of the Trust and Estate Section attend TEPS committee. Council discussed ways to increase attendance of established members. Chair of the Ambassador Program will reach out to members in an effort to increase attendance. Council will monitor this and if needed will further discuss ways to increase attendance at TEPS Committee meetings of established members.

Current Chair, Margrit Parker, expressed gratitude to former Chair, Jennifer Hazelton for her service and requested that Council provide acknowledgement to Ms. Hazelton for her services. Council discussed different options to show gratitude such as plaques, certificates, letters. Emma Baxter will share a Certificate Template with Council Chair. Council will discuss options for expressing gratitude to Committee Chairs and volunteers in coming meetings.

22. **The Colorado Lawyer (Emily Bowman & David Kirch)**
    No report

23. **Communications Representative/Ambassador Program (Kayla Nelson)**
    No report

24. **Board of Governors Representative (Jonathan Haskell)**
    Meeting on the 18^{th} so if anyone has any questions or anything to pass out then let Jonathan know.

25. **Other Business**
    None

ADJOURNMENT

The meeting was adjourned at 4:33 p.m. The next Council meeting will be held November 2, 2022.

Respectfully submitted

/s/ Dylan Metzner, Secretary

#7

COMPLETE

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Page 1

Q1

What position within the section executive council are you applying for?

First-year Council member

Q2

First Name

Griffin

Q3

Last Name

Bridgers

Q4

Pronouns

he/him/his

Q5

Contact Information

Email Address	**griffin.bridgers@gmail.com**
Phone Number	**615-653-3744**

Q6

Colorado Supreme Court Registration Number (if applicable)

41970

Q7

Are you a member of the Colorado Bar Association?

Yes

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

While I do not have much name recognition, I am a long-time contributor in the background to the T&E section through articles, CLE, and past participation in the Orange Book Forms subcommittee. But, beyond this, I have a long history of thought leadership on a national level, and I dedicate a lot of time to speaking to other CLE providers, bar associations, estate planning councils, financial planning councils, and even direct to individuals through my YouTube channel and newsletter. As a natural progression of my past local and national contributions, I am interested in expanding my leadership within the T&E section and the legal profession in general. I feel that serving a term on the Executive Council provides a great opportunity for me to give back in this capacity.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

Post-COVID, there is a growing appetite for both community and education in a hybrid setting. While serving in this position, I would bring fresh ideas to the T&E section's efforts to better engage section members wherever they may be, whether inside and outside of Colorado. My passion is education and thought leadership, and my primary goal would be to identify young talent and solicit their contributions through CLE, articles for The Colorado Lawyer and the section newsletter, and even future section leadership. I would also like to continue the section's efforts in providing meaningful guidance around technological competence in estate planning, especially given the proliferation of software for practice management and drafting over the last few years. I am uniquely situated to contribute on the tech side, as I participate in the advisory boards for two estate planning tech startups. I am also uniquely situated to provide career and practice guidance surrounding the intersection of estate planning and wealth management, and I can lead efforts in this position to develop resources for section members in this area.

Q10

Document attachment: (optional)

Bridgers, Griffin - CV.pdf (82.2KB)

Q11

Area(s) of Practice:

Tax, estate planning

Q12

Race, Ethnicity, or Origin (choose all that apply)

White or Caucasian

Q13

Gender Identity

Male

Q14

Sexual Orientation

Heterosexual

Q15

Disability (a physical or mental impairment that substantially limits one or more major life activities)

No

Q16

Military Service (select all that apply)

Not applicable

Q17

Your full name:

Griffin Bridgers

Q18

Date:

Application submission **09/22/2022**

GRIFFIN H. BRIDGERS
8252 S. Tamarac Street
Centennial, CO 80112
(615) 653-3744
griffin.bridgers@gmail.com

BAR ADMISSIONS

Tennessee, 2008; Colorado, 2010

EDUCATION

NEW YORK UNIVERSITY SCHOOL OF LAW, New York, NY
LL.M. in Taxation, May 2009
Unofficial GPA: 3.61

CUMBERLAND SCHOOL OF LAW, SAMFORD UNIVERSITY, Birmingham, AL
J.D., May 2008
GPA: 3.48; class rank 27/159 (top 17%)
Honors: ***Cumberland Law Review***, Associate Editor

UNIVERSITY OF MEMPHIS, Memphis, TN
B.B.A., Real Estate, *cum laude*, December 2003
GPA: 3.41

WORK EXPERIENCE

BRIDGERS WEALTH STRATEGIES, LLC, Centennial, CO (Owner, July 2022 – present)
Independent wealth strategist for hire on a contract basis, serving the needs of registered investment advisors and family offices as an in-house subject matter expert on tax and estate planning for ultra-high net worth families.

HUTCHINS & ASSOCIATES LLC, Denver, CO (Associate July 2017 – June 2020; Member July 2020 – June 2022; Of Counsel July 2022 - present)
Attorney specializing in tax, estate planning, business planning, and probate and trust administration for ultra-high net worth families, closely-held family business owners, executives, athletes, and farmers and ranchers

SPENCER FANE LLP (FORMERLY BERENBAUM WEINSHIENK PC), Denver, CO (October 2015 – July 2017)
Associate Attorney specializing in tax, employee benefits and ERISA, executive compensation, estate planning and business planning for high net worth families and closely-held family business owners, probate and trust administration, tax credit financing, and tax-exempt organizations

SHORTRIDGE, FITZKE & HULTQUIST PC, Englewood, CO (September 2009 – October 2015)
Associate Attorney specializing in tax, nonqualified deferred compensation, estate planning and business planning for high net-worth families and closely-held family business owners, probate

and trust administration, and general counsel services for closely-held businesses

SPEAKING ENGAGEMENTS

[UPCOMING] *Business Trends at the Intersection of Estate Planning and Wealth Management*, Tennessee Bankers Association, November 1, 2022

Estate Planning in a Rising Interest Rate Environment, Kitces.com, June 7, 2022

Basis and Income Tax Planning Through Retained Interests, Santa Fe Estate Planning Council, April 20, 2022

Advisor Alert: Important 2021 Developments in the Business Planning Space You Need to Know About Now, Leimberg Information Services, Inc. (LISI), March 2022

Estate Planning for Difficult Assets, FPA Colorado Chapter, October 2021

Estate Planning ABCs: No Longer Just for JDs, FPA Idaho Chapter, February 2021

The Estate Attorney Down the Hall, FPA Puget Sound Chapter, November 2020

Estate Planning in a Financial Advisory Practice, FPA Utah Chapter, November 2020

Inside, Outside, Upside Down: Balancing the Basics of Basis Adjustments, Denver Tax Institute, July 24, 2018

Trust and Estate Tax Update, April 2018 to the Colorado Bar Association Tax Section and February 2018 to the Greater Denver Tax Council

Employee Benefits Risks That Should Be on Your Radar (Co-Presenter), Association of Corporate Counsel – Colorado Chapter, May 2017

FIRPTA Update, Colorado Bar Association Tax Section, February 2017

Presenter of CLE and CPE for: Strafford Publications, MyCPE, and various bar associations

PUBLICATIONS

Are Financial Advisors Turning Away from Referrals? Rethinking the Interaction of Estate Planning and Wealth Management Practices, TRUSTS & ESTATES (April 2021)

Powers of Appointment Primer, Part 2: Taxation of Powers of Appointment, 47 THE COLO. LAWYER 56 (August/September 2018)

Basis Step-Up Planning: A Double-Edged Sword, 32 PROBATE AND PROPERTY 24 (July/August 2018)

Powers of Appointment Primer, Part 1: The Colorado Uniform Powers of Appointment Act, 47 THE COLO. LAWYER 54 (June 2018)

Health and Education in Trust Administration: A More Active Role for Trustees, TRUSTS & ESTATES (February 2018)

Proposed Valuation Regulations May Affect Real Estate Entities, COLO. REAL ESTATE JOURNAL (January 2017)

Multi-State Issues When Appointing Guardians for Minors, 43 THE COLO. LAWYER 11 (November 2014)

TEACHING EXPERIENCE

COLLEGE FOR FINANCIAL PLANNING, Centennial, CO (April 2011 to present)
Adjunct Associate Professor
Courses taught include online modules on Estate Planning and Income Taxation for the CFP Mentor Program, Live Review and Web Review of the Estate Planning module for the CFP Exam Preparation Program, and various estate planning courses for graduate degree programs. Substantive work includes review and revision of written materials for intermediate and advanced estate planning courses for graduate degree programs

PROFESSIONAL INVOLVEMENT

STRAFFORD PUBLICATIONS, INC.
Tax & Accounting Advisory Board

COLORADO BAR ASSOCIATION
Trusts & Estates Section
Taxation Section

AMERICAN BAR ASSOCIATION
Taxation Section – Member
Real Property, Trusts & Estates Section – Member

#8

COMPLETE

Collector: Web Link 1 (Web Link)
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Page 1

Q1

What position within the section executive council are you applying for?

First Year Council Member

Q2

First Name

Teagan

Q3

Last Name

Boda

Q4

Pronouns

she/her

Q5

Contact Information

Email Address	**TBoda@ngpueblolaw.com**
Phone Number	**7195437243**

Q6

Colorado Supreme Court Registration Number (if applicable)

56452

Q7

Are you a member of the Colorado Bar Association?

Yes

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

My interest in the leadership position is to give a voice not only to younger attorneys as part of the CBA Trust and Estate Section, but also to advocate for the interests of Greater Colorado. I think that it is crucial that the leadership for the section is made up of attorneys from all backgrounds, and I believe that I would make a great addition to this.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

I would like to accomplish helping the CBA Trust and Estates section be more friendly to younger lawyers, disabled attorneys, and to attorneys in the Greater Colorado regions. With the rise of platforms such as Zoom, we can truly gather together and engage attorneys who practice trust and estates from all backgrounds.

Q10

Document attachment: (optional)

Resume.docx (14.3KB)

Q11

Area(s) of Practice:

Estate Planning, Probate, Family Law, Evictions, some Civil Litigation (minor part of practice)

Q12

Race, Ethnicity, or Origin (choose all that apply)

White or Caucasian

Q13

Gender Identity

Female

Q14

Sexual Orientation

Heterosexual

Q15

Disability (a physical or mental impairment that substantially limits one or more major life activities)

Yes

Q16

Military Service (select all that apply)

Not applicable

Q17

Your full name:

Teagan Boda

Q18

Date:

Application submission	**09/22/2022**

Teagan Boda, Esq.

473 W. Hahns Peak Ave., Pueblo West, CO 81007 | TBoda@ngpueblolaw.com | (719) 252-4383

EDUCATION

Colorado State University – Pueblo, Pueblo, Colorado
M.B.A., expected May 2023

William & Mary Law School, Williamsburg, Virginia
J.D., May 2021
Honors: Clinical Legal Education Association Outstanding Clinic Student Award
William & Mary Bill of Rights Journal, Senior Articles Editor
Alternative Dispute Resolution Competition Team

Colorado State University – Pueblo, Pueblo, Colorado
B.S., Political Science, May 2018. Minor in Homeland Security.
B.A., History, May 2018. Minor in Psychology.
Honors: Diane Blackwell President's Leadership Award

EXPERIENCE

Naylor & Geisel, P.C., Pueblo Colorado
Associate Attorney — October 2021 to Present
Legal Clerk — August 2021 to October 2021
I am handling complex cases involving a variety of issues including estate planning, probate, and family law. I work with QuickBooks, Time Slips, Adobe, and Microsoft Office to complete housekeeping tasks.

Special Education Law Clinic, Williamsburg, Virginia
Clinic Student — Spring 2020, October 2020 to June 2021
I worked on multiple cases involving complex issues surrounding the special education system, including the cross section of disability and racial injustice.

Family Law Clinic, Williamsburg, Virginia
Clinic Student — Spring 2021
I worked on cases involving divorce as well the intersection of divorce and domestic violence. I also helped to put together a presentation for the Legal Aid Society of Virginia on how lawyers can help their clients file for divorce.

Domestic Violence Clinic, Williamsburg, Virginia
Clinic Student — Spring 2021
I attended meetings on the collaborative efforts of numerous organizations to help victims of domestic violence. I also planned and hosted an event on the impact of domestic violence on the disabled community.

ORGANIZATIONS

Colorado Bar Association
Pueblo Bar Association
Colorado Diverse Attorney Community Council, Planning Committee Member
Colorado Disability Bar Association (forthcoming)

#9

COMPLETE

Collector: Web Link 1 (Web Link)
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Last Modified: Wednesday, September 28, 2022 12:59:45 PM
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Page 1

Q1

What position within the section executive council are you applying for?

First Year Council Member

Q2

First Name

Chris

Q3

Last Name

Schmidt

Q4

Pronouns

he/him

Q5

Contact Information

Email Address	**cschmidt@cp2law.com**
Phone Number	**(970) 225-6700**

Q6

Colorado Supreme Court Registration Number (if applicable)

47886

Q7

Are you a member of the Colorado Bar Association?

Yes

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

My current practice includes estate planning, business succession planning, and business transactions and I would like make a positive impact to the estate planning community in within the state. I am also currently serving on the Tax Section Executive Council. My involvement with the Estate Planning Council may provide me more opportunities to expand the educational opportunities involving tax and estate planning issues. Lastly, I am located in Northern Colorado so my involvement with the Section would provide opportunities to bring more members from Northern Colorado into the Section.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

I would like to expand outreach into Northern Colorado; potentially participate in Orange Book updates; provide educational opportunities; and act as an unofficial liaison to the Tax Section.

Q10

Document attachment: (optional)

2022.7.Schmidt Resume.pdf (91.7KB)

Q11

Area(s) of Practice:

Estate Planning; Business Succession; Business Transactions; Tax; Real Estate Transactions

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Q12

Race, Ethnicity, or Origin (choose all that apply)

White or Caucasian

Q13

Gender Identity

Male

Q14

Sexual Orientation

Heterosexual

Q15

Disability (a physical or mental impairment that substantially limits one or more major life activities)

No

Q16

Military Service (select all that apply)

Not applicable

Q17

Your full name:

Christopher Don Schmidt

Q18

Date:

Application submission **09/28/2022**

Christopher D. Schmidt
Fort Collins, CO 80525
(970) 556-1426 | chris@schmidtlawpllc.com

EXPERIENCE

Coan, Payton & Payne, LLC, Fort Collins, CO
Senior Associate Attorney, November 2020 – Present

Draft estate planning documents, including irrevocable and revocable trusts, wills, and ancillary estate plan documents; Work with client advisors on tax planning and business planning; Assist clients with business transactions including mergers and acquisitions, formations, dissolutions, conversions, as well as a variety of other business transactions; Prepare and review real estate transaction documents including leases, PSAs, easements, deeds of trust, loan documents; Research business/corporate, estate planning, tax, and real estate issues; Participated in business development.

K·Coe Isom, Loveland, CO
Transactional Tax Attorney/Corporate Counsel, September 2018 – October 2020

Analyzed and interpreted estate planning documents including, revocable trusts, IDITs, SLATs, and charitable trusts; Reviewed and drafted organizational and entity documents for limited liability companies, partnerships, and corporations; Performed research on estate planning, tax planning, business succession, and business transactions and communicated the findings of the same to both internal and external clients in both oral and written communications; Developed business succession and estate plans and worked with clients and their advisors in executing the same; Provided representation in Tax Court proceedings and IRS examinations; and Analyzed and presented on complex technical tax projects.

Schmidt Law, PLLC, Rigby, ID
Attorney, November 2014 – August 2018

Drafted trust and estate planning documents; Assisted clients in probate; performed legal research; Negotiated business contracts and residential leases; Prepared business organizational documents; Advised clients operating federally regulated businesses; Researched and drafted memoranda; Represented clients in family law matters; Prepared demand letters; Represented clients in both criminal and civil proceedings; Prepared motions; Responsible for client development and retention.

EDUCATION

University of Florida Levin College of Law, Gainesville, FL
Master of Laws in Taxation, May 2018
Graduate Thesis: *Tax Consequences to Buyers and Sellers of S Corporations*

The University of South Dakota School of Law, Vermillion, SD
Juris Doctor, May 2014

Colorado State University, Fort Collins, CO
Master of Science in Construction Management, May 2008
Graduate Thesis: *Performance Evaluation of Various Hot Mixed Asphalt Rehabilitation Strategies*
Helwan University International Project Management Study Participant

Brigham Young University – Idaho, Rexburg, ID
Bachelor of Science in Business Finance, August 2005
Business Department Scholarship Recipient

ACTIVITIES, ACHIEVEMENTS, AND PERSONAL INTERESTS

Member Colorado Bar Association, Taxation Section (Executive Counsel 2020), Chair Northern Colorado Chapter of the J. Reuben Clark Law Society; Executive Secretary for the International Board of the J. Reuben Clark International Law Society; Kentucky Colonel; Eagle Scout; Interests include fly fishing, traveling, and cooking.

BAR ADMISSIONS

Colorado (2014); Utah (2015); Idaho (2016)

#10

COMPLETE

Collector: Web Link 1 (Web Link)
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Page 1

Q1

What position within the section executive council are you applying for?

First Year Council Member

Q2

First Name

Donald

Q3

Last Name

Hutchins

Q4

Pronouns

He, Him, His

Q5

Contact Information

Email Address	**dhutchins@bakerlaw.com**
Phone Number	**303-764-4071**

Q6

Colorado Supreme Court Registration Number (if applicable)

54995

Q7

Are you a member of the Colorado Bar Association?

Yes

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

I am applying for the First Year Council Member position with the CBA Trust and Estate Executive Council. I have been practicing in the areas of trusts and estates for over seven years and have a strong passion for the subject area. As a somewhat new member to the Colorado Bar (2020), I am interested in becoming more involved with the Trust and Estate Section. The First Year Council Member position appears to be a great opportunity to begin my involvement and to understand all of the functions of the Trust and Estate Section.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

I want to be able to provide meaningful contributions to the Trust and Estate Section throughout my career, whether through serving on committees, writing articles or serving in other roles that advance the practice of trusts and estates in Colorado. Longer term, legislative committees and contributing to publications interest me the most. I also want to stay on top of matters directly impacting Colorado, including legislative and case law updates, pro bono initiatives and Orange Book updates.

I think the First year Council Member position would provide a solid base experience for myself within the Trust and Estate Section that I could build on in the future with further involvement. While not totally unique, I think my background with a heavy emphasis on wealth transfer tax planning and a more transactional focused trusts and estates practice could add value to the Trust and Estate Section as a different angle on the practice.

Q10

Document attachment: (optional)

Hutchins-Resume.pdf (23.4KB)

Q11

Area(s) of Practice:

Private Wealth

Q12

Race, Ethnicity, or Origin (choose all that apply)

White or Caucasian

Q13

Gender Identity

Male

Q14

Sexual Orientation

Heterosexual

Q15

Disability (a physical or mental impairment that substantially limits one or more major life activities)

No

Q16

Military Service (select all that apply)

Not applicable

Q17

Your full name:

Donald Hutchins

Q18

Date:

Application submission	**09/29/2022**

DONALD B. HUTCHINS

1915 Niagara Street, Denver, Colorado 80220
704.576.9226 - dhutchins@bakerlaw.com

BAR ADMISSIONS

Admitted in Colorado, 2020
Admitted in Tennessee, 2014

EDUCATION

NEW YORK UNIVERSITY SCHOOL OF LAW, New York, New York
LL.M. in Taxation, May 2015

THE UNIVERSITY OF MISSISSIPPI SCHOOL OF LAW, University, Mississippi
Juris Doctor, *magna cum laude*, May 2014

Honors:	Certificate of Business Law with Honors
	Mississippi Sports Law Review, *Articles Editor*
	Outstanding Student Awards: *Estate Planning*; *Taxation of Corporations and Shareholders*; *Corporate Finance*; and *Civil Procedure II*
Activities:	University of Mississippi Business Law Institute, *Member*
	Volunteer Income Tax Assistance, Spring 2014

THE UNIVERSITY OF MISSISSIPPI, University, Mississippi
Bachelor of Business Administration in Banking and Finance, May 2011

Honors:	Academic Excellence Scholarship
	Beta Gamma Sigma International Honors Business Society

EXPERIENCE

BAKER & HOSTETLER LLP, Denver, Colorado
Associate, June 2019-present

- Plan and prepare trust modification agreements, trust decantings, private split-dollar agreements, trust combinations and divisions, and non-judicial settlement agreements.
- Draft irrevocable grantor trusts and implement gifting, loan, insurance and sale transactions with such trusts.
- Assist families in establishing, operating and transitioning management of family offices.
- Research and analyze tax issues with respect to private trust companies.
- Form private foundations and advise directors with respect to operational planning.
- Prepare federal estate, gift, and estate and trust income tax returns.

BAKER, DONELSON, BEARMAN, CALDWELL & BERKOWITZ, P.C., Memphis, Tennessee
Associate, June 2015-May 2019

- Draft estate planning instruments including intentionally defective grantor trusts, grantor retained annuity trusts, complex wills, investment services trusts, and other irrevocable and revocable trust agreements.
- Assist family offices, large private business owners, and high-net-worth individuals with succession planning, gifting strategies, and the disposition of business interests.
- Research, analyze, and provide tax opinions on federal wealth transfer, partnership, and corporate tax issues.

- Work with privately held businesses in connection with drafting partnership and LLC agreements, purchase agreements, redemption agreements, buy-sell agreements, and voting agreements.

PROFESSIONAL ACTIVITIES/COURT ADMISSION

- American Bar Association
- Colorado Bar Association, Trust and Estate Section
- Rocky Mountain Estate Planning Council
- Admitted to the United States Tax Court, 2017

PUBLICATIONS

- "Treasury to Withdraw Controversial Section 2704 Proposed Regulations" (October 2017)
- "President Trump Has Been Inaugurated. What's Next for Tax Reform?" (January 2017)

#11

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Sunday, October 02, 2022 3:10:23 PM
Last Modified: Sunday, October 02, 2022 3:23:03 PM
Time Spent: 00:12:39
IP Address: 159.53.78.254

Page 1

Q1

What position within the section executive council are you applying for?

First Year Council Member

Q2

First Name

Margot

Q3

Last Name

Edwards

Q4

Pronouns

She/Her

Q5

Contact Information

Email Address	**margot.edwards@jpmorgan.com**
Phone Number	**720-935-9495**

Q6

Colorado Supreme Court Registration Number (if applicable)

37929

Q7

Yes

Are you a member of the Colorado Bar Association?

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

I am truly excited about the potential to serve as a member of the Executive Council. I served in several firm leadership roles during my fourteen-year tenure as a trusts and estates attorney at Holland & Hart in Boulder and Denver. My most notable role was my service as a member of the Management Committee, which oversees the firm's strategic direction. As a part of the firm leadership, I was fortunate to have had a number of successes with developing and implementing new strategies, in collaboration with the rest of the leadership team. In the process, I cultivated deep relationships with my peers at the firm. Each of my leadership roles has been deeply rewarding, and a highlight of my career thus far.

Earlier this year, I joined J.P. Morgan Private Bank as a Managing Director and Wealth Advisor. At both Holland & Hart and in my new role at J.P. Morgan I have had the pleasure to work with numerous highly skilled professionals in the trusts and estates field across the country, including other attorneys, accountants, family office providers, and financial advisors. In my current role, I regularly collaborate with trusts and estates attorneys with whom J.P. Morgan shares clients, primarily in Colorado but also in other jurisdictions. I meet via zoom at least weekly with the other Wealth Advisors (trusts and estates attorneys in markets across the country) at J.P. Morgan to discuss developments in the law, issues, and solutions. This experience affords me the opportunity to have perspective on what is happening in our field in other jurisdictions. As a result, I feel that I have knowledge and experience that would add to the discussion of various issues relevant to the Trusts and Estates Section.

While in private practice, I focused my leadership activities within my firm. Following joining J.P. Morgan in January, I am excited to explore new leadership opportunities. In my current role I now have the time to fully devote myself to serving the Trusts and Estates Section. I very much appreciate being considered for this position.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

If selected to serve in this position, I would like to help move the Section's priorities forward in service to its members all over the state. Specifically, I would enjoy working with the standing and working committees on their projects, as well as connecting with local and specialty bars to collaborate on shared goals. I am also excited to participate in strategic planning around future trends and legislative changes. This is an area where I feel I can contribute based on my broad view of the practice across the country.

I would also like to contribute in a meaningful way to the Section's commitment to diversity and inclusion. While at Holland & Hart, I was a founding member of the firm's Women's Forum, which has grown into a strong group that not only supports women in their career paths, but also makes policy recommendations to the firm's management. In addition, I served as the liaison between the Management Committee and the firm's Diversity, Equity and Inclusion Committee. I had the opportunity to learn from my diverse colleagues, to develop new strategies, and to advocate for change at the firm in furtherance of our diversity goals. Diversity and inclusion are very important to me and I would like to remain strongly engaged in this area through the Section.

Finally, I would like to work with the other members of the Executive Council on strategies for keeping the Section vibrant going forward. While we are always evolving, following the pandemic there has been significant change in the way that young professionals in particular view their career and law practice. I am interested in how we continue to make the Section appealing to young lawyers and maintain relevance for their long-term career paths.

Q10

Document attachment: (optional)

2022 Resume.pdf (387.4KB)

Q11

Area(s) of Practice:

Estate Planning and Tax

Q12

Race, Ethnicity, or Origin (choose all that apply)

White or Caucasian

Q13

Gender Identity

Female

Q14

Sexual Orientation

Heterosexual

Q15

Disability (a physical or mental impairment that substantially limits one or more major life activities)

No

Q16

Military Service (select all that apply)

Not applicable

Q17

Your full name:

Margot Edwards

Q18

Date:

Application submission **10/02/2022**

MARGOT SUMMERS EDWARDS
1455 16th Street, Suite 407
Denver, CO 80202
(720) 935-9495
Margot.edwards@jpmorgan.com

EXPERIENCE

J.P. Morgan Private Bank — Denver, Colorado
Managing Director and Wealth Advisor — January 2022 to Present

- Meet with clients and prospects to identify and discuss their tax and personal planning goals. Discuss estate planning techniques and sophisticated wealth transfer options to assist with meeting those goals.

Holland & Hart LLP — Boulder and Denver, Colorado
Partner (as of January 1, 2015) — September 2007 to December 2021

- <u>Wealth Transfer Planning</u>: Design and implement sophisticated wealth transfer plans, customized to meet clients' tax and personal goals. Utilize planning techniques such as sales to intentionally defective irrevocable trusts, posturing assets for discounts, GRATs, and charitable structures. Focus particularly on working with entrepreneurs and pre-liquidity planning.
- <u>Estate and Trust Administration</u>: Represent fiduciaries and beneficiaries in connection with estate and trust administration, including complex trust administration for multiple generations of beneficiaries.
- <u>Management Committee</u>: Elected member of the five partner Holland & Hart Management Committee, which oversees the strategic direction of the firm, from 2017 to 2021.
- <u>Other Firm Contributions</u>: Founding member of Women's Forum, Member of Diversity Committee, Former Member of Professional Development Committee.

University of Colorado — Boulder, CO
Adjunct Professor — December 2016-May 2017

- Developed curriculum and taught Wills & Trusts.

Colorado Supreme Court — Denver, CO
Law Clerk for Justice Gregory J. Hobbs, Jr. — September 2006 to September 2007

- Prepared memos outlining recommended disposition of petitions for certiorari.
- Researched and drafted Supreme Court opinions.

EDUCATION

University of Colorado School of Law
Juris Doctor, 2006
Order of the Coif
Journal on Communications and High Technology Law, Associate Editor

St. John Fisher College
Bachelor of Science, Political Science, 2001
Summa Cum Laude

RECOGNITION

Chambers High Net Worth Guide, Private Wealth Law, 2020-2022

The Best Lawyers in America©, Tax Law, 2017-2022; Trusts & Estates Law, 2018-2022; Tax Lawyer of the Year, Boulder, 2022

5280 Magazine Top Lawyers, Estate Planning, 2021

Colorado Super Lawyers® Rising Stars, 2012

PUBLICATIONS AND SPEAKING ENGAGEMENTS

"Fiduciary Duty and Selecting Trust Situs, What Should a Trustee Consider?" *The Colorado Lawyer*, Co-Author, October 2021

"Charitable Trusts," *CBA CLE Understanding and Using Trusts Series*, Co-Presenter, March 2021

"Tax Matters Related to Settlement Agreements," *Holland & Hart Fiduciary Solutions Group Symposium*, October 2019

"Current Tax Considerations for Fiduciaries and their Advisors," *Holland & Hart Fiduciary Solutions Group Symposium*, November 2017

"Planning for the Family Business," *Colorado Bar Association Estate Planning Retreat*, Co-Presenter, June 2017

"Intersections between Marital Agreements and Estate Planning," *Holland & Hart Fiduciary Solutions Group Symposium*, November 2016

"Planning with Charitable Trusts," *Colorado Bar Association Estate Planning Retreat*, Co-Presenter, June 2011

"Does Your Charitable Trust Qualify?" *Colorado Planned Giving Roundtable Technical Series*, Co-Presenter, October 2010

"Charitable Trusts," *Colorado Bar Association Publication*, Co-Author, 2011, Updated 2017

"Holland & Hart Fiduciary Law Blog, www.fiduciarylawblog.com," published blog topics include:

- "Continuing Urgency Related to Gift and Estate Tax Planning" February 22, 2021
- "Will the Current Estate and Gift Tax Exemptions be Reduced before 2025?" June 4, 2019
- "United States Supreme Court to Consider Whether States May Tax Trusts based on Residence of Beneficiary" February 25, 2019
- "Clarification Regarding Deduction of Expenses by Trusts and Estates" July 30, 2018
- "Asset Protection Statute Cannot Limit Jurisdiction of Another State" April 9, 2018
- "IRS Can Reopen Estate Tax Return to Determine Available DSUE Upon Death of Second Spouse" November 20, 2017
- "Proposed Estate Tax Legislation" March 27, 2017
- "Nuances of Estate Tax Lien Priority" November 7, 2016
- "High Net Worth Taxpayers and Their Advisors Should Act Now to Address the Proposed Regulations to Section 2704," Co-Author, August 12, 2016
- "New Reporting Required of Estate Fiduciaries by IRS" April 11, 2016

PROFESSIONAL AFFILIATIONS

Rocky Mountain Estate Planning Council
American Bar Association, Tax Section
Colorado Bar Association, Trust and Estate Section
Colorado Women's Bar Association
Boulder County Bar Association

#12

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 26, 2022 2:29:06 PM
Last Modified: Wednesday, October 26, 2022 2:54:10 PM
Time Spent: 00:25:03
IP Address: 98.38.131.181

Page 1

Q1

What position within the section executive council are you applying for?

First Year Council Member

Q2

First Name

Elizabeth

Q3

Last Name

Howard

Q4

Pronouns

she/her

Q5

Contact Information

Email Address	**ehoward@goddardhawkins.com**
Phone Number	**303-292-3228**

Q6

Colorado Supreme Court Registration Number (if applicable)

41439

Q7

Are you a member of the Colorado Bar Association?

Yes

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

I have specifically looked for ways to get involved in a leadership role in the Colorado Bar Association and the estate planning community, and believe the First Year Council Member Position would be a great way to accomplish both of these goals. I have reviewed the Trusts and Estate Section Bylaws pertinent to this position, spoke with Emma Baxter about the role and responsibilities, and would welcome the opportunity to contribute. I look forward to learning about the issues that are important to the estate planning community and to having a voice in these issues.

I spent the first ten plus years of my legal career as a litigator. In July 2021, I made an exciting and scary transition to a completely new area of the law—estate planning and administration. This was the best career move I have made for myself. Estate planning is the perfect fit for me. I thrive on the interaction with my clients, and am challenged and enjoy the planning and drafting piece of my practice. I am thrilled to have made this transition. My goals over this past year were to learn as much as I could in this new area, and to begin expanding my connections within the estate planning community. I am still learning and connecting. Looking back over the past 16 months, I am astounded by the knowledge I have gained, and by what I have been able to contribute to my firm in just a short amount of time. I hope to expand my participation in the estate planning community through my role in this position.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

My goals as a First Year Council Member would be to gain a good understanding of the workings of the Executive Council, to develop relationships with each of its members, and to provide value through my reliable participation and willingness to contribute. My ultimate goal would be for my participation to provide added value to the section and for this to be my introduction into a continued active leadership role within the Trusts and Estates Section Executive Council.

I am a self-proclaimed “people person” and gravitate toward leadership opportunities. I have been an engaged member of the Doyle Inn of Court Executive Committee since 2016; first as a member and ultimately as the President of the Inn from July 2021-July 2022. I understand the First Year Council Member position to be a great introduction into the Executive Council and a first step toward leadership. I would like to prove myself a valued member of the team and someone who would be a good leader within the Council.

As the newest member of the Council, if selected, I look forward to learning more about the individual subcommittees and to helping in any way most useful to the Council.

Q10

Document attachment: (optional)

Elizabeth%20Howard%20Resume_updated%2022.10.19.pdf (259.3KB)

Q11

Area(s) of Practice:

Estate Planning and Probate and Trust Administration

Q12

Race, Ethnicity, or Origin (choose all that apply)

White or Caucasian

Q13

Gender Identity

Female

Q14

Sexual Orientation

Heterosexual

Q15

Disability (a physical or mental impairment that substantially limits one or more major life activities)

No

Q16

Military Service (select all that apply)

Not applicable

Q17

Your full name:

Elizabeth Jane Meier Howard

Q18

Date:

Application submission **10/26/2022**

ELIZABETH J.M. HOWARD

(815) 353-6595; Ejmhoward26@gmail.com
www.linkedin.com/in/elizabethjmhoward

Legal Experience

Goddard & Hawkins, P.C., *Denver, CO* **July 2021-Present**
Attorney

- Provide legal advice and counseling to families and individuals in the areas of estate planning, trust and estate administration, and probate
- Represent clients in the preparation of premarital and marital agreements, including counseling clients regarding all provisions in the event of divorce and death, preparing, and reviewing the agreements

Hershey Decker Drake PLLC, *Lone Tree, CO* **July 2018 – May 2021**
Attorney

- Represented health care providers through all aspects of malpractice, licensing board, credentialing, and business matters from case inception through resolution
- Regularly took and defended depositions of key witnesses including plaintiffs' depositions and standard of care and causation experts' depositions
- Presented at COPIC Roundtable, Claims Committee, and defense counsel meetings
- Represented health care facilities in malpractice actions and counseled clients through complex discovery matters involving peer and quality management issues

Kennedy Childs, P.C. / Childs McCune LLC, *Denver, CO* **November 2012 - November 2016**
Attorney

- Represented health care entities, medical doctors, dentists, and other professionals in malpractice, licensing board, credentialing, and business matters
- Successfully defended high-value complex civil litigation matters at multiple jury trials including arguing and being granted a directed verdict in a wrongful death action
    - *Stannard v. Weary, M.D.* (defense verdict)
    - *Sovde v. Sarka, M.D., et. al.* (defense verdict)
    - *Caldwell v. Penland, M.D., et. al.* (directed verdict)
- Regularly took and defended depositions in complex civil litigation matters
- Appeared as first chair attorney for clients at discovery hearings
- Drafted motions for determinations of law and summary judgment including being granted summary judgment in a dental malpractice action, which was upheld on appeal by the Colorado Court of Appeals

The Harris Law Firm, P.C., *Denver, CO* **October 2010 - October 2012**
Attorney

- Advocated for clients on a wide range of complex domestic relations matters including divorce, allocation of parental responsibilities, contempt proceedings, and post-decree matters
- Represented clients as lead attorney at numerous trials, hearings, depositions, and mediations

The Honorable Russell Carparelli, *Colorado Court of Appeals, Denver, CO* **August 2009 - August 2010**
Appellate Judicial Clerk

- Worked daily with Judge Carparelli to analyze and resolve appeals
- Prepared draft opinions for numerous types of civil and criminal appeals
- Researched legal issues including contract and statutory interpretation, post-conviction claims, affirmative defense instructions, admissibility of other act evidence, and due process violations

ELIZABETH J.M. HOWARD

Ejmhoward26@gmail.com

Education and Bar Admission

Admitted to the Colorado Bar **October 2009**

University of Denver Sturm College of Law, *Denver, CO*
J.D. received May 2009; Order of St. Ives (**8th of 276; top 3% of class)**
Earned top grade in five upper level classes

University of Denver, *Denver, CO*
Bachelor of Arts in Psychology received May 2006

Legal Leadership and Awards

William E. Doyle Inn of Court, *Immediate Past President* **July 2021 – July 2022**

William E. Doyle Inn of Court, *President* **July 2020 – June 2021**

- Served as the leader for the first Inn chartered by the American Inns of Court in Colorado with over 100 active members including many distinguished members of Colorado's legal community
- Led monthly Inn of Court and Executive Committee meetings
- Developed a monthly Inn of Court coffee chat program to help drive engagement during the COVID-19 pandemic
- Designed, prepared, and distributed the first Inn of Court quarterly newsletters

William E. Doyle Inn of Court, *Member* **2008 - present**
Executive Committee Officer-President-Elect July 2019 - June 2020
Executive Committee Officer-Treasurer July 2018 - June 2019
Executive Committee Officer-Secretary July 2017 - June 2018
Executive Committee Member July 2016 - present

Colorado Women's Bar Association, *Member* **2012 - present**
Board of Directors-Convention Co-chair May 2018 - May 2019
Board of Directors-Professional Advancement Co-chair May 2016 - May 2018

- Submitted over 20 state and national award nominations for Colorado women lawyers
- Created and implemented three-part "Claiming your Value" workshop
- Advanced and updated the CWBA Lift Mentoring Program
- Managed the CWBA Mentoring Program subcommittee

Membership Committee Member 2014 - 2016
Judicial Nominating Committee Member 2013 - 2014

Super Lawyers® Rising Star Award
Selected to the 2016, 2017, and 2018 Super Lawyers Colorado Rising Star List

Colorado Lawyer's Committee Pro Bono Team of the Year Award **February 2012**
Received for work on Lobato v. State of Colorado

Presentations and Volunteer Work

William E. Doyle Inn of Court CLE Trainings, *Presenter*
So You are Going to be a Witness-Now What? **March 2021** (CLE Credits approved)
Taking or Defending a Deposition: Practical Tips for Young Lawyers **October 2014** (CLE Credits approved)
How to Navigate Private Practice: What You Need to Know **April 2015** (CLE Credits approved)

University of Denver Mentorship Program, *Mentor* **2013 - 2018**

Family Tree Legal Clinic, *Presenter* **2010 - 2012**

#13

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 27, 2022 1:08:13 PM
Last Modified: Thursday, October 27, 2022 2:12:53 PM
Time Spent: 01:04:39
IP Address: 192.65.155.193

Page 1

Q1

What position within the section executive council are you applying for?

First Year Council Member

Q2

First Name

Jesse

Q3

Last Name

Bopp

Q4

Pronouns

He/Him/His

Q5

Contact Information

Email Address	**jessebopp@alpinebank.com**
Phone Number	**970-946-3934**

Q6

Colorado Supreme Court Registration Number (if applicable)

36926

Q7

Are you a member of the Colorado Bar Association?

No

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

Starting in 2006, I practiced estate planning and administration in Durango, CO, representing clients throughout the region. During that time, I learned and culled material from the CBA Trust & Estates Section. I admired the Section, information, and materials. In my current position with Alpine Bank Wealth Management, I am fortunate to no longer operate a business, and so seek to re-direct that time to grow professionally. To me that includes learning, contributing, and building relationships within the T&E Section.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

As noted above, I would like to learn, contribute, and build relationships within the T&E Section. I am interested in the process as well.

Q10

Document attachment: (optional)

Resume%20-%20Jesse%20Bopp%20-%202022.pdf (86.4KB)

Q11

Area(s) of Practice:

Trust & Estate Administration within a Trust Department (Alpine Bank Wealth Management)

Q12

Race, Ethnicity, or Origin (choose all that apply)

White or Caucasian

Q13

Gender Identity

Male

Q14

Sexual Orientation

Heterosexual

Q15

Disability (a physical or mental impairment that substantially limits one or more major life activities)

No

Q16

Military Service (select all that apply)

Not applicable

Q17

Your full name:

Jesse Bopp

Q18

Date:

Application submission **10/27/2022**

JESSE BOPP

ALPINE BANK
WEALTH
MANAGEMENT
1099 Main Ave., Durango, CO 81301
970-426-7162
jessebopp@alpinebank.com

RESUME

HONORS AND AWARDS:	Ethics Award Nominee SW Colorado Bar Association, 2006 Best Attorney Durango Herald Readers' Choice Awards, 2013 Runner-up Best Attorney Durango Herald Readers' Choice Awards, 2014
EMPLOYMENT:	Alpine Bank Wealth Management, VP – 2018 - present Bopp Reynolds Law Group, Partner, 2012 – 2018 J.A. Bopp, LLC, Attorney, 2007 to 2012 Craig Law Firm, P.C., Associate, 2006 – 2007 Greenberg, Herringer & Ward, LLC, Associate, 2005 – 2006
PRIOR PRACTICE AREAS:	Estate Planning Probate & Trust Administration Real Estate Business & Corporate Creditor's Rights & Debtor's Remedies
PROFESSIONAL BACKGROUND AND MEMBERSHIPS:	Admitted to the Colorado Bar 2005 Member, Colorado Bar Association, 2005 – present Member, Southwest Colorado Bar Association, 2005 – present Member, Lions Club International Foundation, 2013 – 2016 Board Member – Durango Nature Studies, 2008 – 2010 Board Member – Durango Arts Center, 2018 – 2021 Board Member and Officer – SW CO Bar Assoc., 2021 to present Fellow – Colorado Bar Foundation, 2021 to present
EDUCATION:	University of Alaska Fairbanks, B.S., 1997 Major: Wildlife Biology West Virginia University, Morgantown, M.S., 2002 Major: Wildlife & Fisheries Resources University of Wyoming, College of Law, J.D., 2005

Colorado Bar Association

Trust & Estate

For the Three Months Ending September 30, 2022

		September	YTD	Budget	Variance	%	Last FY
Beginning balance	**01-3160-31600**		**$43,092.16**		**$43,092.16**	**0%**	**$37,346.81**
Trust & Estate Section							
Revenue							
Dues Income Section	01-4050-31600	3,180.00	28,965.00		28,965.00	0%	31,605.00
Total Revenue Trust & Estate Sect		**3,180.00**	**28,965.00**		**28,965.00**	**0%**	**31,605.00**
Expenses							
Other Expense	01-5000-31600	(1,000.00)	(1,000.00)		(1,000.00)	0%	
Meals (Not travel related)	01-5491-31600					0%	(182.86)
Administration Fee	01-5494-31600	(1,110.38)	(3,331.14)		(3,331.14)	0%	(3,233.88)
Grants/Contributions	01-5500-31600		(3,500.00)		(3,500.00)	0%	
Total Expenses Trust & Estate Sec		**(2,110.38)**	**(7,831.14)**		**(7,831.14)**	**0%**	**(3,416.74)**
Statutory Revisions Committee							
Revenue							
Rev. Elderlaw Joint Task Force							
Rev. Uninform POA Act							
Rev. Uniform Trust Code							
Expenses							
Exp. Elderlaw Joint Task Force							
Exp. Uninform POA Act							
Exp. Uniform Trust Code							
CLE							
Revenue							
Revenue Joint CLE							
Revenue CLE Retreat							
Revenue CLE Section Only							

Colorado Bar Association

Trust & Estate

For the Three Months Ending September 30, 2022

		September	YTD	Budget	Variance	%	Last FY
Expenses							
Expenses Joint CLE							
Expenses CLE Retreat							
Expenses CLE Section Only							
Council Notes							
Revenue							
Expenses							
Community & Civic Affairs							
Revenue							
Contributions	01-4500-31613		$3,500.00		$3,500.00	0%	
Total Revenue Community & Civic			**3,500.00**		**3,500.00**	**0%**	
Expenses							
Rules & Forms Committee							
Revenue							
Expenses							
Orange Book Forms							
Revenue							
Expenses							
Local Liaison							
Revenue							
Expenses							
Uniform Trust Code							
Revenue							
Expenses							
Transfer Deposits							

Colorado Bar Association

Trust & Estate

For the Three Months Ending September 30, 2022

	September	YTD	Budget	Variance	%	Last FY
Revenue						
Expenses						
Admin. Chair						
Revenue						
Expenses						
Estate Planning Handbook						
Revenue						
Expenses						
Admin Council Dinner						
Revenue						
Expenses						
Legislative Liaison						
Revenue						
Expenses						
Internet Editor						
Revenue						
Expenses						
Technology Committee						
Revenue						
Expenses						
Real Estate Liaison						
Revenue						
Expenses						
Green Book						
Revenue						

Colorado Bar Association

Trust & Estate

For the Three Months Ending September 30, 2022

		September	YTD	Budget	Variance	%	Last FY
Expenses							
The Colorado Lawyer							
Revenue							
Expenses							
T&E Diversity Committee							
Revenue							
Misc Income	01-4299-31628	$1,000.00	$1,000.00		$1,000.00	0%	
Total Revenue Diversity Committe		**1,000.00**	**1,000.00**		**1,000.00**	**0%**	
Expenses							
Judicial Liaison							
Revenue							
Expenses							
Member Vouchers							
Expenses							
T&E Young Lawyer Society							
Revenue							
Expenses							
Beginning Balance	**01-3160-31600**		**43,092.16**		**43,092.16**	**0%**	**37,346.81**
Total Revenue All Sources	**01-4???-316??**	**4,180.00**	**33,465.00**		**33,465.00**	**0%**	**31,605.00**
Total Expense All Sources	**01-5???-316??**	**(2,110.38)**	**(7,831.14)**		**(7,831.14)**	**0%**	**(3,416.74)**
Ending Balance		**2,069.62**	**68,726.02**		**68,726.02**	**0%**	**65,535.07**

KIRCH ROUNDS BOWMAN & DEFFENBAUGH PC
MEMORANDUM

TO: **CBA Council of the Trust and Estate Section**

FROM: **Chad Rounds**

RE: **Summary of 10/18/22 CBA Real Estate Section Council Meeting**

DATE: **10/19/22**

I attended the CBA Real Estate Section Council ("RESC") meeting on 10/18/22 by Zoom. The following is my report on matters addressed which the CBA Trust and Estate Section Council ("TESC") might find of interest:

Legislative Update:

On the statewide ballot, Amendment D, regarding designating judges, is supported by the CBA. It amends the Colorado Constitution to prevent disruption to judicial services as the new 23rd Judicial District is created.

The Real Estate Section is putting together a draft list of changes to respond to issues to HB 1137 (HOA bill). The goal is to make numerous critical fixes to that legislation.

Warden v. Tschetter FDCPA case:

This is a Colorado District Court case in which a law firm is being sued for violating the Fair Debt Collection Practices Act. An issue at hand is whether this law firm, which represents landlords in eviction proceedings, is considered a "debt collector."

Denver Initiated Ordinance 305 - "No Eviction Without Representation":

Ordinance 305 would impose a $75 per unit excise tax on landlords to fund legal representation for all tenants.