SUSAN N. GARY

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# EDUCATION

COLUMBIA UNIVERSITY SCHOOL OF LAW, New York, New York

Degree - Juris Doctor, 1981

Honors - Editorial Board, Columbia Journal of Environmental Law

Pi Upsilon Delta Honorary Society

YALE UNIVERSITY, New Haven, Connecticut

Degree - Bachelor of Arts, History, 1977

Honors - Graduated cum laude

ZANESVILLE HIGH SCHOOL, Zanesville, Ohio

Honors - Valedictorian

# PROFESSIONAL EMPLOYMENT

UNIVERSITY OF OREGON, SCHOOL OF LAW, Eugene, Oregon, fall 1992 – present

Professor Emerita (phased retirement/part-time professorial appointment, 2020-present); Orlando J. and Marian H. Hollis Professor of Law, 2008 – 2020; Professor, 2006-2008; Associate Professor, 2000-2006; Assistant Professor, halftime 1992-1996, fulltime 1996-2000; Adjunct Professor, 1989, 1991, 1992

Associate Dean for Academic Affairs, 2006-2008

Teaching and research interests include fiduciary duties and the prudent investor standard, use of purpose trusts to hold and operate businesses, definition of family for inheritance, regulation of charities, and the use of mediation in estate planning

MAYER, BROWN & PLATT, Chicago, Illinois, summer 1980, 1981-1985, 1986-1987

Lawyer - Specialization in the law of charitable giving and in estate planning. Experience included organizing and representing private foundations, advising public charities on corporate and tax matters, and assisting individuals in estate and tax planning.

DEBANDT, VAN HECKE & LAGAE, Brussels, Belgium, 1985-1986

Lawyer - Worked with Belgian and American corporations on international tax matters; advised Belgian corporations and individuals on general aspects of American law.

OFFICE OF THE REGIONAL ATTORNEY, Department of Health, Education and Welfare, New York,

New York, summer 1979

Legal Assistant - Wrote legal responses to administrative claims.

COVINGTON & BURLING, Washington, D.C., 1977-1978

Paralegal - Assisted in civil litigation and legislative hearings.

**HONORS**

Hollis Teaching Award, University of Oregon School of Law, 2019

Excellence in Writing Award for Best Trust and Estate Cutting-Edge Article, Probate & Property (published by the Real Property, Probate and Trust Law Section of the ABA), 2019

American Law Institute, elected 2017

Wayne T. Westling Award, 2014 (awarded by the University of Oregon Senate to a faculty or staff member for outstanding long-term leadership and service to the university)

Oregon Research Innovation Award, University of Oregon, 2010

Fellow, American Bar Foundation, elected 2009

Excellence in Writing Award for Best Overall Article - Probate and Trust, Probate & Property (published by the Real Property, Probate and Trust Law Section of the ABA), 2005

Academic Fellow, American College of Trust and Estate Counsel, elected 2001

# PUBLICATIONS – Books

Naomi R. Cahn, Alyssa A. DiRusso and Susan N. Gary, In Focus: Trusts and Estates (Wolters/Kluwer, 2019), and accompanying Teacher’s Manual.

Susan N. Gary, George G. Bogert, George T. Bogert, & Amy Morris Hess, Bogert’s The Law of Trusts and Trustees, §§ 511-550 (2d ed. revised, 2019).

Roger W. Andersen and Susan N. Gary, Understanding Trusts and Estates (Carolina Academic Press, 6th ed. 2018, 7th ed. 2022).

Susan N. Gary, ed., Mediation for Estate Planners: Managing Family Conflict (American Bar Association, 2016).

Susan N. Gary, George G. Bogert & George T. Bogert, The Law of Trusts and Trustees, §§ 321-352 (2d ed. revised, 2015).

Susan N. Gary, Jerry Borison, Naomi R. Cahn and Paula A. Monopoli, Contemporary Trusts and Estates (Wolters/Kluwer, 2011, 2d ed. 2014, 3d ed. 2016, 4th ed. 2022), and accompanying Teacher’s Manual for each edition. First edition title: Contemporary Approaches to Trusts and Estates; Second edition title: Contemporary Trusts and Estates: An Experiential Approach.

# PUBLICATIONS – Law Review Articles

Susan N. Gary, “The Changing Landscape of Business Succession: How and Why Purpose Trusts Matter.” Ohio State Bus. L. J. (forthcoming 2024).

Susan N. Gary, “Conflicts and Opportunities for Pension Fiduciaries in the ESG Environment.” 74 Okla. L. Rev. 607 (2022), pp. 607-52.

Susan N. Gary, “The Electronic Wills Act: Facing the Inevitable.” 55 Real Prop., Tr. & Est. J. 305 (2020), pp. 305-46.

Susan N. Gary, “The Oregon Stewardship Trust: A New Type of Purpose Trust that Enables Steward-Ownership of a Business.” 88 Univ. of Cincinnati L. Rev. 707 (2019), pp. 707-33 (symposium on The Business Uses of Trusts).

Susan N. Gary, “Best Interests in the Long Term: Fiduciary Duties and ESG Integration.” 90 Univ. of Colorado L. Rev. 731 (2019), pp. 731-801.

Susan N. Gary, “Restricted Charitable Gifts: Public Benefit, Public Voice.” 81 Albany L. Rev. 101 (2018), pp. 101-44.

Susan N. Gary, “Values and Value: University Endowments, Fiduciary Duties, and ESG Investing.” 42 The Journal of College and University Law 247 (2016), pp. 247-309.

Susan N. Gary, Jerry Borison. Naomi R. Cahn, and Paula A. Monopoli, “Contemporary Trusts and Estates – An Experiential Approach.” 58 St. Louis L. Rev. 727 (2014), pp. 727-38.

Susan N. Gary, “Definitions of Children and Descendants: Construing and Drafting Wills and Trust Instruments.” 5 Texas Tech Estate Planning and Community Property Law Journal 283 (2013), pp. 283-322.

Susan N. Gary, “The Probate Definition of Family: A Proposal for Guided Discretion in Intestacy.” 45 Mich. J. of L. Reform (2012), pp. 787-27.

Susan N. Gary, “Is It Prudent to be Responsible: The Legal Rules for Charities that Engage in Socially Responsible Investing and Mission Investing.” 6 Nw. J.L. & Soc. Pol’y 106 (2011), pp. 106-78.

Susan N. Gary, “The Problems with Donor Intent: Interpretation, Enforcement, and Doing the Right Thing.” 85 Chicago-Kent L. Rev. 977 (2010).

Susan N. Gary, “We Are Family: The Definition of Parent and Child for Succession Purposes.” 34 ACTEC Journal 171 (2008), pp. 171-86.

Susan N. Gary, “The Oregon Elective Share Statute: Is Reform an Impossible Dream?” 44 Willamette L. Rev. 337 (2007), pp. 337-76.

Susan N. Gary, “Charities, Endowments, and Donor Intent: The Uniform Management of Institutional Funds Act.” 41 Georgia L. Rev. 1277 (2007), pp. 1277-33.

Susan N. Gary, “Transfer-on-Death Deeds: the Nonprobate Revolution Continues.” 41 Real Prop., Prob. & Trust J. 529 (2007). pp. 529-69. Selected for inclusion in “The Best Articles Published by the ABA” 24 GPSolo (Sept. 2007).

Susan N. Gary, “Applying Revocation-on-Divorce Statutes to Will Substitutes.” 18 Quinnipiac Probate L. J. 83 (2004), pp. 83-127.

Susan N. Gary, “The Parent-Child Relationship Under Intestacy Statutes.” 32 Univ. Memphis L. Rev. 643 (2002), pp. 643-85.

Susan N. Gary, “Regulating the Management of Charities: Trust Law, Corporate Law and Tax Law.” 21 U. Hawai`i L. Rev. 593 (2000), pp. 593-657.

Susan N. Gary, “Adapting Intestacy Laws to Changing Families.” 18 Law & Inequality J. 1 (Univ. of Minn.) (2000), pp. 1-82.

Susan N. Gary, “Mediation and the Elderly: Using Mediation to Resolve Probate Disputes Over Guardianship and Inheritance.” 32 Wake Forest L. Rev. 397 (1997), pp. 397-444.

Susan N. Gary, “Marital Partnership Theory and the Elective Share: Federal Estate Tax Law Provides a Solution.” 49 University of Miami L. Rev. 567 (Spring/Summer 1995), pp. 567-605.

**PUBLICATIONS – Book Chapters**

Susan N. Gary and Nancy E. Shurtz, “Non-Tax Considerations in Testamentary Transfers to Minors,” In *Estate, Tax and Life Planning for Minors* (Chicago: ABA 2005), 60 pp. (2d ed. 2019).

**PUBLICATIONS – Other Writings**

Susan N. Gary, “Overview of the Oregon Uniform Trust Code.” Chapter 2 in Administering Trusts in Oregon, 2024 Revision (OSB: 2024).

Susan N. Gary, “Business Succession Planning Using a Purpose Trust.” The FinReg Blog, sponsored by the Duke Financial Economics Center (Dec. 13, 2023).

Beck Groff & Susan N. Gary, “Patagonia, Purpose Trusts, and Stewardship Trusts – Business with a Purpose,” 37 Prob. & Prop.1 (Jan./Feb. 2023).

Susan Gary, Keith Johnson & Tiffany Reeves, “ERISA Regulations Should Address Evolving Nature of Prudence and Duty of Impartiality,” The FinReg Blog, Duke University School of Law [https://sites.law.duke.edu/thefinregblog/2022/03/15/erisa-regulations-should-address-evolving-nature-of-prudence-and-duty-of-impartiality%ef%bf%bc/](https://urldefense.com/v3/__https:/sites.law.duke.edu/thefinregblog/2022/03/15/erisa-regulations-should-address-evolving-nature-of-prudence-and-duty-of-impartiality**B/__;77-8!!C5qS4YX3!X4PqdzMvfXqXMYEBcm4eLHuhILJmFrxuikviSsJIwbAGWbTe4wkPPskuKIPzITEn$) (Mar. 15, 2022).

Keith L. Johnson, Susan N. Gary & Tiffany R. Reeves, “Proposed US Department of Labor Rules on ESG Ignore Duty of Impartiality,” SSRN: <https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4023660> (Feb. 9, 2022).

Ruth Y. Gao & Susan N. Gary, “Steward Ownership in the United States,” in the Steward-ownership section of the SEGIB-UNIP Roadmap for Purpose-driven Companies (forthcoming 2022).

Susan Gary, Jan Hania, Steven Moe, Natalie Reitman-White, Murray Whyte, Phillippa Wilkie, “Purpose- driven structures for Impact Entrepreneurs in Aotearoa New Zealand: Considering Kaitiakitanga and Steward Ownership.” White paper, on file with author.

Susan N. Gary, “Wills for the Underserved—Pro Bono Mentorship Program for Law Schools.” Probate & Property (Jan./Feb. 2020), pp. 54-55.

Susan N. Gary, “Oregon Update: Cases and Legislation.” Portland Estate Planning Council (Feb. 9, 2020); Lane County Bar Association, Probate Committee (Nov. 12, 2019).

Susan N. Gary, “The Need for a New Type of Purpose Trust, the Stewardship Trust.” 45 ACTEC Law J. 701- 05 (2019).

Susan N. Gary, “When Is an Execution Error Harmless: Electronic Wills Raise New Harmless Error Issues.” Probate & Property (Nov./Dec. 2019).

Susan N. Gary, “Oregon Legislature Updates Oregon Nonprofit Corporation Law.” Nonprofit Organizations Law Section of the Oregon State Bar website (June 5, 2019).

Susan N. Gary, “Harmless Error: History of the Doctrine and Recent Cases from the U.S. and Australia.” Advanced Estate Planning, Oregon State Bar, Portland, Oregon, June 14, 2019.

Susan N. Gary, “Report of the Oregon Law Commission: House Bill 3006, House Bill 3007, House Bill 3008.” Submitted to the House Judiciary Committee as written testimony in support of HB 3006, 3007, 3008 (Mar. 13, 2019).

Susan N. Gary, “Report of the Nonprofit Organizations Law Section of the Oregon State Bar: Senate Bill 360.” Submitted to the House Judiciary Committee as written testimony in support of SB 360 (Mar. 4, 2019).

Susan N. Gary, “Oregon Stewardship Trusts: Written Testimony Submitted to the House Judiciary Committee in support of HB 2598-1.” Submitted as written testimony (Mar. 19, 2019).

Susan N. Gary, “Overview of the Oregon Uniform Trust Code.” Chapter 2 in Administering Trusts in Oregon, 2018 Revision (OSB: 2018).

Keith Johnson, Susan N. Gary and Cynthia Williams. “Fiduciary Duty Guidance for Proxy Voting Reform.” Harvard Law School Forum on Corporate Governance and Financial Regulation, available at https://corpgov.law.harvard.edu/2018/11/27/comment-letter-fiduciary-duty-guidance-for-proxy-voting-reform/ (Nov. 27, 2018).

Keith Johnson, Susan N. Gary and Cynthia Williams. “Commentary: Fiduciary Duty Yellow Flags for Proxy Season.” Pensions & Investments Online, available at https://www.pionline.com/article/20180417/ONLINE/180419859/commentary-fiduciary-duty-yellow-flags-for-proxy-season (Apr. 17, 2018).

Susan N. Gary, “Oregon Update: Cases and Legislation.” Portland Estate Planning Council (Feb. 9, 2018); Lane County Bar Association, Probate Committee (Dec. 12, 2018); Seattle Estate Planning Council (Nov. 10, 2017).

Susan N. Gary, “Green-Aware Investors Can do Good—and Well.” Eugene Register Guard (April 17, 2017).

Susan N. Gary, “Feel Good Doing Good:  Impact Investing When Settlors and Beneficiaries Want to Do More than Make Money.” Ch. 14 in 51st Annual Heckerling Inst. on Estate Plan. (2017).

Susan N. Gary, “Amendments to the Oregon Probate Code: Report of the Probate Modernization Work Group.” Submitted to the Oregon Law Commission, Jan. 24, 2017, and to the House Judiciary Committee as written testimony in support of HB 2986 (Mar. 27, 2017).

Susan N. Gary, “Report of the Nonprofit Organizations Law Section of the Oregon State Bar: House Bill 2609.” Submitted to the House Judiciary Committee as written testimony in support of HB 2609 (Feb. 21, 2017).

Susan N. Gary, “Nonprofit Organizations Law Section – Proposed Changes to Chapter 65.” Or. Nonprofit Orgs. L. Newsl. (Spring 2016).

Susan N. Gary, “Amendments to the Oregon Probate Code: Report of the Probate Modernization Work Group.” (Jan. 2016). Submitted to the Oregon Law Commission and used as written testimony in support of HB 4102.

Susan N. Gary, “Fiduciary Duties and ESG Investing: Corporate Governance and the Growing Importance of ESG Reporting.” The CLS Blue Sky Blog (Columbia Law School’s Blog on Corporations and the Capital Markets) (Nov. 11, 2015).

Susan N. Gary, “Fiduciary Duties and ESG Investing.” Trusteeship, Association of Governing Boards (Nov./Dec. 2015).

Susan N. Gary, Keith L. Johnson and Megan K Jackson, “Application of Fiduciary Duty to Sustainable Investment Practices.” Intentional Endowments Network, available at https://www.intentionalendowments.org/application\_of\_fiduciary\_duty\_to\_sustainable\_investment\_practices (Nov. 2015).

Susan N. Gary, “Fiduciary Duties and ESG Investing: Can Charities Adopt Investment Policies That Include Consideration of Environmental, Social, and Governance Factors?” Or. Nonprofit Orgs. L. Sec. Newsl. (Summer 2015).

Susan N. Gary, **“**慈善投资资产管理人的信责义务－美国的法律规则和挑战” (Fiduciary Duties Of Managers of Charitable Investment Assets – U.S. Legal Rules and Challenges, translated into Chinese by Lili Zhan), Journal of Wenzhou University (2015).

Susan N. Gary, “Probate Modernization Proposal.” Or. Est. Plan. & Admin. Sec. Newsl. (Mar. 2015).

Susan N. Gary, “ORS Chapter 65 Review Project Update: Recommended Changes and a Request for Feedback.” Or. Nonprofit Orgs. L. Newsl. (Spring 2015).

Susan N. Gary, “Work Group Report: Amendments to the Oregon Probate Code.” (Feb. 2015). Submitted to the Oregon Law Commission and used as written testimony in support of SB 379.

Susan N. Gary, “Values and Value.” Eugene Register Guard (April 27, 2014).

Susan N. Gary, “Mediation During the Planning Stage – Facilitated Discussions and Mediation.” CLE materials for 2014 ACTEC Annual Meeting; reprinted for Advantages of Mediation in Resolving Wills, Trusts, Estates, and Adult Guardianship Matters, sponsored by NYSBA Dispute Resolution Section (June 14, 2018).

Susan N. Gary, “2013 Amendments to the Oregon Uniform Trust Code.” Or. Elder L. Newsl. (Oct. 2013).

Susan N. Gary, “Work Group Report: Amendments to the Oregon Uniform Trust Code.” (March 20, 2013). Submitted to the Oregon Law Commission and used as written testimony in support of SB 592.

Susan N. Gary, “A Model Act to Protect Charitable Assets Will Benefit Charities.” 23 Taxation of Exempts 26 (Jan,/Feb. 2012).

Susan N. Gary, “Restricted Gifts Under UPMIFA,” Investments & Wealth Monitor 20 (May/June 2011).

Susan N. Gary, “Revocation Reminders.” Or. Est. Plan & Admin. Sec. Newsl. (Oct. 2010).

Susan N. Gary and Dennis Horn, “Death Without Probate – TOD Deeds – the Latest Tool in the Arsenal.” 24 Prob. & Prop. 13 (Mar./Apr. 2010).

Susan E. Budak and Susan N. Gary, “Legal and Accounting Challenges of Underwater Endowment Funds.” 24 Prob. & Prop. 28 (Jan./Feb. 2010).

Susan N. Gary, Letter to the Editor, “How to Wiggle Prudently.” Chronicle of Philanthropy (Oct. 2009).

Susan N. Gary, “2009 Legislation from the Estate Planning and Administration Section.” Or. Elder L. Newsl. (Oct. 2009).

Susan N. Gary, “Legislative Update: Estate Planning and Administration.” Oregon State Bar PLF Newsletter (fall 2009).

Susan N. Gary, “Endowment Spending: What’s a University to Do?” Real Prop., Trust & Estate Law eReport, (June 2009).

Susan N. Gary, “Introduction to Succession Law in the 21st Century.” 43 Real Prop., Trust & Estate Law J. 387 (2008).

Susan N. Gary, “Uniform Law Commission Develops Transfer-on-Death Deeds.” Or. Elder L. Newsl. (Apr. 2008), pp. 15-18.

Susan N. Gary, “Changes in Laws Affect Estate Planning.” Or. Elder L. Newsl. (Oct. 2007).

Susan N. Gary, “Legislative Review.” Or. Est. Plan & Admin. Sec. Newsl. (July 2007).

Susan N. Gary, “UPMIFA: Coming Soon to a Legislature Near You.” 21 Prob. & Prop. (Jan./Feb. 2007).

Susan N. Gary and Valerie J. Vollmar, “Overview of the Oregon Uniform Trust Code.” In Administering Trusts in Oregon, 2006 Revision (OSB: 2006).

Susan N. Gary, “New Endowment Management Guidelines Offer More Flexibility.” Currents (published by the Council for Advancement and Support of Education) (Oct. 2006).

Jonathan A. Levy, David R. Allen, Susan N. Gary, and Ryan E. Gibb, “Estate Planning and Administration, Guardianships, and Conservatorships.” In 2005 Oregon Legislation Highlights (OSB, 2005). (Section on the Uniform Trust Code).

Susan N. Gary, “Posthumously-Conceived Heirs: Where the Law Stands and What to Do About It Now.” 19 Probate & Property (Mar./Apr. 2005). Selected for inclusion in “The Best Articles Published by the ABA” 24 GPSolo (Sept. 2005).

Susan N. Gary, “Revisions to the Uniform Management of Institutional Funds Act.” Or. Est. Plan & Admin. Sec. Newsl. (Oct. 2004).

Susan N. Gary, “Revisions to the Uniform Management of Institutional Funds Act.” 30 ACTEC Journal, no. 3 (Winter 2004).

Susan N. Gary, “Oregon Uniform Trust Code – Proposed Changes to Oregon Law.” Or. Est. Plan & Admin. Sec. Newsl. (July 2004).

Susan N. Gary, “Committee Proposes Oregon Uniform Trust Code Revisions.” Or. Elder L. Newsl. (Summer 2004).

Susan N. Gary, “Till Death Do Us Part – Revocation on Divorce Statutes.” Or. Est. Plan. & Admin. Sec. Newsl. (Apr. 2004).

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Susan N. Gary, “Mediation in Probate.” Or. Elder L. Newsl. (Spring 2004).

Susan N. Gary, “Posthumously Conceived Heirs.” Or. Est. Plan. & Admin. Sec. Newsl. (Apr. 2003).

Susan N. Gary, “State Statute Does Not Revoke Beneficiary Designation After Divorce.” 28 Est. Plan. (Aug. 2001).

Susan N. Gary, “Significant Probate and Trust Literature.” Significant Current Developments (Am. Bar Assn., Aug. 1999).

Susan N. Gary, “Mediating Probate Disputes.” 13 Probate & Property (Jul./Aug. 1999). Reprinted in Gerry W. Beyer, Wills, Trusts, and Estates (2d ed. 2000). Reprinted as “Guidelines for Recommending Mediation in Probate” in Probate Solutions (Mar./Apr. 2000).

Susan N. Gary, “Elective Share Statutes: Policies and Problems.” Or. Est. Plan. & Admin. Sec. Newsl. (Jul.. 1999).

Susan N. Gary, “Significant Probate and Trust Literature.” Significant Current Developments (Am. Bar Assn., Aug. 1998).

Susan N. Gary, “Adoption of the UPC's Elective Share Statute.” 12 Probate & Property (Mar./Apr. 1998).

Susan N. Gary, “Guidelines for Recommending Mediation in Probate.” Or. Est. Plan. & Admin. Sec. Newsl. (Jan. 1998).

Susan N. Gary, “The Federal Estate and Gift Tax System.” Broad Brush Taxation II (Oregon State Bar, 1997).

Susan N. Gary, “Significant Probate and Trust Literature.” Significant Current Developments (Am. Bar Assn., Aug. 1997).

Susan N. Gary, “Recent Developments in State and Local Regulation of Nonprofit Organizations.” (Am. Bar Assn., Aug. 1997).

Susan N. Gary, “Significant Probate and Trust Literature.” Significant Current Developments (Am. Bar Assn., Aug. 1996).

Susan N. Gary, “Significant Probate and Trust Literature.” 30 Real Property, Probate and Trust Journal (Fall 1995).

Susan N. Gary, “Teaching the Elective Share as Part of the Basic Trusts and Estates Curriculum.” (Am. Bar Assn.: Aug. 1995).

Susan N. Gary, contributing author, George Bogert, Trusts and Trustees, 2nd ed. rev. (St. Paul: West Publishing Company, 1992), sections on taxation of charitable trusts (§§ 245, 264.25, 270.5, 275.5, 283, 329, and 330).

Susan N. Gary, “Making Grants to Foreign Organizations.” 2(3) The Journal of Taxation of Exempt Organizations, 41 (1990).

Susan N. Gary, “Scenes from a Problem--Dealing with the Excess Business Holdings Rules.” 2(2) The Journal of Taxation of Exempt Organizations, 40 (1990).

Susan N. Gary, “Grant-Making for Employer-Related Scholarship Plans.” 2(1) The Journal of Taxation of Exempt Organizations, 41 (1990).

Susan N. Gary, “Helping Others Without Hurting the Foundation--Scholarships and Other Grants to Individuals.” 1(4) The Journal of Taxation of Exempt Organizations, 54 (1990).

Susan N. Gary, “Complying with the Grant-Making Rules for the Private Foundation.” 1(3) The Journal of Taxation of Exempt Organizations, 39 (1989).

Susan N. Gary, “Appreciated Property Transferred in Trust May Carry Hidden Tax Bill.” 2(1) The Journal of Taxation of Estates and Trusts, 54 (1989).

Susan N. Gary, “Support Organizations and Operating Foundations Can Bring Public Charity Benefits to Private Foundations.” 1(2) The Journal of Taxation of Exempt Organizations, 52 (1989).

Susan N. Gary, “Estate Tax Deferral for the Closely Held Business Gains Importance after Anti-Estate Freeze Legislation.” 1(4) The Journal of Taxation of Estates and Trusts, 47 (1989).

Susan N. Gary, “Planning for the Creation and Management of a Private Nonoperating Foundation.” 1(1) The Journal of Taxation of Exempt Organizations, 49 (1989).

Susan N. Gary, “Fiduciary Return Preparers Face Broad Arsenal of Penalties.” 1(3) The Journal of Taxation of Estates and Trusts, (1989).

Howard M. McCue III, Charles F. Newlin and Susan N. Gary, “Administration of Charitable Trusts.” Chapter 10 in Trust Administration (Chicago: Illinois Institute for Continuing Legal Education, 1983, rev. 1987).

Susan N. Gary, A Lawyer's Guide to Private Foundations. Chicago: Illinois Donors Forum of Chicago, 1985, supp. 1987.

Howard M. McCue III and Susan N. Gary, “Split-Interest Charitable Giving--Down but Not Out.” Chapter 8 in The Twentieth Annual Institute on Estate Planning. (Miami: University of Miami, 1986).

**PROFESSIONAL SERVICE**

University of Oregon Board of Trustees

Trustee (2013-2017)

American Law Institute

Elected member; adviser, ALI Rest. of the Law, Charitable Nonprofit Organizations (2016-2019)

Intentional Endowments Network

Steering Committee (2014 – 2020)

Fiduciary Duty and Policy Group (2014 – present)

National Conference of Commissioners on Uniform State Laws (Uniform Law Commission)

Drafting Committee on Electronic Wills

Reporter (2017-2019)

Drafting Committee on the Regulation of Charitable Assets Act

Reporter (Nov. 2010 – 2011)

Co-Reporter (Jan. – Nov. 2010)

Advisor from the RPTE Section of the ABA (2007-2010)

Drafting Committee for Transfer on Death Deeds

Advisor from the RPTE Section of the ABA (2007-2009)

Drafting Committee to Revise Uniform Management of Institutional Funds Act

Reporter (2002-2006)

Study Committee on the Uniform Durable Powers of Attorney Act

Co-chair (2001-2002)

National Uniform Trust Code Committee, member, (2004-2010)

Joint Editorial Board, Uniform Trust and Estate Acts

Special Reporter, Project to revise definition of parent and child in intestacy statutes (2003-2005)

Oregon Law Commission

Commissioner (2011- 2024)

Probate Modernization Workgroup, reporter (2013-2021)

2015 legislation enacted, 2016 legislation enacted, 2017 legislation enacted, 2019 legislation enacted

Legislative testimony: Hearing of the House Judiciary Committee, March 27, 2017

Legislative testimony: Hearing of the House Judiciary Committee, March 13, 2019

Oregon Uniform Trust Code Amendments Workgroup, chair (2012-13)

2013 legislation enacted

Transfer on Death Deed Workgroup, member (2010-2011)

2011 legislation enacted

Elective Share Workgroup, member (2004-2009, 1997-2000)

2001 legislation enacted

Oregon Study Committee on the Uniform Trust Code, co-chair (2002-2005)

Legislative testimony: Hearing of the Senate Judiciary Committee, March 22, 2005

Legislative testimony: Hearing of the House Judiciary Sub-committee on Civil Law, May 16, 2005

Oregon Uniform Trust Code enacted 2005

New York University, National Center on Philanthropy and the Law

Member, Board of Advisors (2006-2009) (2012-2015)

Law School Admissions Council

Investment Policy Oversight Group, member (2010-2011)

Nonprofit Law Prof Blog

Contributing Editor (2007-2011)

Financial Accounting Standards Board

External reviewer for FSP FAS 117-a (2008)

American College of Trusts and Estate Counsel, elected as an Academic Fellow, 2001

Regent (2011-2017)

Long-range Planning Committee (2023-present)

Charitable Planning and Exempt Organizations Committee, Secretary (2004-2010);

member (2003-present)

State Laws Committee, member (2003-present); Bioethics Subcommittee, Chair (2005-2008); Elective Share Subcommittee, member (2008-2016)

Legal Education Committee, Co-Chair (2011-2014); member (2003-present)

Conference Organizer: “The Law of Succession in the 21st Century” (2008)

Conference Committee: “Philanthropy in the 21st Century” (2009); “The Uniform Probate Code: Remaking of American Succession Law” (2011)

Academic Membership Committee, Chair (2011-2014); member (2014-present)

21st Century Task Force, member (2009-2012)

Nominating Committee, member (2008, 2017-2018)

ACTEC Foundation

Trustee (2017-2023)

Grant Committee (2017-2023)

Editorial Activities

Associate Articles Editor, Probate & Property, magazine of the Real Property, Probate and Trust Law Section of the American Bar Association (1997-2005)

Editor-in-Chief, Estate Planning and Administration Section Newsletter of the Oregon State Bar

(1995-2000, 2001-2010)

American Bar Association, Section of Real Property, Trust and Estate Law

Council Member (2010-2016)

Planning Committee, member (2010-2017)

Groups and Substantive Committee, member (2012-2014)

Community Outreach Committee, member (2013-2017), co-chair (2015-2017)

Wills for the Underserved Subcommittee, co-chair (2013-2015)

Charitable Planning and Organizations Group, Group Vice Chair (2009-2010)

Legislative and Regulatory Issues Committee, Chair (2008-2009)

Publications Committee, member (2008-2009)

Uniform Acts for Probate and Trust Law, Co-Chair (2004-2008)

Section Advisory Board, member (2005-2009)

Standing Committee on Digital Signature & E-Commerce, member (2003-2009)

Electronic Wills, Trusts and Probate, Committee, member (2003-2004)

State and Local Law Concerns of Exempt Organizations Committee, Chair (1996-2000)

Study Committee for Law Reform of Exempt Organizations, Vice-Chair (1996-1998)

Significant Current Developments, Vice-Chair (1996-2000)

Significant Current Literature, Vice-Chair (1994-1996)

Reviewer, Guide to Wills & Estates (ABA 2004)

Association of American Law Schools

Executive Committee of Nonprofit Organizations Section (2006-2012)

Executive Committee of Elder Law Section, Chair (2006-2007); responsible for 2007Annual Meeting program; Chair-Elect (2005-2006); member (2002-2008)

Executive Committee of Donative Transfer Section, Chair (2000-2001); responsible for

2000 Annual Meeting program; Chair-Elect (1999-2000); Editor, Section Newsletter (1997); member (1997-2001); mentor (2012-present)

Commons Advisory Board

Member, advisory board for the Commons Law Center, Portland, Oregon (2017-present)

Oregon State Bar Association Estate Planning and Administration Section

Executive Committee, Chair (2010); Chair-Elect (2009); Treasurer (2008); Secretary (2007);

member (2002-2011)

Legislative Drafting Committee re: durable power of attorney statute, member (2002-2004)

Legislative Drafting Committee re: the elective share, Chair (1996-1998)

Oregon State Bar Association Nonprofit Organizations Law Section

Executive Committee (2011-2014) (2015-2022)

Chapter 65 Work Group, Chair and Reporter (2013-2021)

Review and revision of Oregon’s Nonprofit Corporation Code. HB 2609 introduced in 2017 session, died in committee; revised and re-introduced as SB 360 in 2019 session and enacted

Legislative testimony: Hearing of the House Judiciary Committee, February 21, 2017

Technical corrections bill, SB 185 introduced in 2021 session; Legislative testimony: Hearing of the House Judiciary Committee, February 18, 2121; Hearing of the Senate Judiciary Committee, May 3, 2021

Stewardship trust ad hoc legislative committee (2018-2019)

Worked with an ad hoc group to develop HB 2598, introduced by Rep. Fahey, enacted 2019

# INVITED LECTURES

“Oregon Update: Legislation and Cases 2022-23.” 53rd Annual Estate Planning Seminar, Portland Estate Planning Council, Portland, Oregon, February 2, 2024.

“Legal and Accounting Frameworks for Investing Charitable Funds.” National Center on Philanthropy and the Law, 33rd Annual Conference, New York, New York, October 26, 2023.

“Oregon Uniform Trust Code (UTC): Getting Started.” Basic Trust Administration, Oregon State Bar, November 18, 2022 (remotely).

“What Is the Purpose of Purpose Trusts?” Webinar with Jeff Patterson, Oregon Law Perspectives, 2023 Summer Series, University of Oregon School of Law, May 18, 2023.

“Fiduciary Duties and Sustainable Investing: What Works and Why.” 67th Annual Estate Planning Seminar, Seattle, Washington, October 25, 2022.

“Patagonia’s Transfer of Ownership.” Green Business Initiative’s Lunchtime Series, Eugene, Oregon, October 12, 2022.

“Charities and Sustainable Investing: Putting Your Mission Where Your Money Is.” Webcast with Jennifer B. Goode, Northern California Planning Giving Council, Heidi Strassburger Masters Program, August 18, 2022.

“Trust Law as a Tool for Employee-Controlled Companies” (keynote). Wills, Trusts & Estates Conference 2022, Oklahoma City University School of Law, Oklahoma City, Oklahoma, April 8, 2022.

“Sustainable Investing for Fiduciaries.” ALI CLE/ACTEC webcast, with Turney Berry and Laura Mandel, March 15, 2022.

“Adventures in State Law: Oregon 2021 Legislation and 2019-21 Cases.” 51st Annual Estate Planning Seminar, Portland Estate Planning Council, Portland, Oregon, February 4, 2022.

“ESG and Tax Policy – Responsible Tax Policies for a Better Future” (panelist). American Bar Association Tax Section Virtual 2022 Midyear Tax Meeting, February 2, 2022 (remotely).

“Update on UPMIFA.” National Consulting and Advisory Practice, Bank of America, June 9, 2021 (remotely).

“Conflicts and Opportunities for Pension Fiduciaries in the ESG Environment.” 2021 Pension Research Council Virtual Symposium, April 30, 2021 (remotely).

“ESG: No Longer a Trend You Can Ignore” (panelist). Northern Trust Institute: Planning with Purpose, April 22, 2021 (remotely).

“Staying Relevant: Endowment as a Tool in the Toolkit” (co-presenter and panelist). Climate Action Pursuit, Intentional Endowments Network, February 25, 2021 (remotely).

“Funds Under Pressure: Restrictions, Obligations, and Stewardship” (co-presenter and panelist). Western Conference on Tax Exempt Organizations, December 4, 2020 (remotely).

“Considering Kaitiakitanga and Stewardship Ownership” (co-panelist). Sponsored by the Edmund Hillary Fellowship, New Zealand, December 3, 2020 (remotely).

“Oregon’s Stewardship Trusts: A New Tool for Business Planning.” Eugene Estate Planning Council, November 17, 2020 (remotely).

“Electronic Wills: Facing the Inevitable.” Oregon State Bar and Estate Planning Section, November 13, 2020 (remotely).

“UPMIFA and Nonprofit Investing” (co-presenter). Oregon State Bar and Nonprofit Organizations Law Section, November 12, 2020 (remotely).

“Stewardship Trusts.” J.P. Morgan Wealth Advisors, November 3, 2020 (remotely).

“The Future of ESG” (co-presenter/panelist). Webinar hosted by Ferguson Wellman Capital Management and West Bearing Investments, October 1, 2020 (remotely).

“Uniform Electronic Wills Act” (co-presenter). Estate Planning and Probate Section of the Alaska Bar, telephonic presentation, March 10, 2020.

“Uniform Prudent Management of Institutional Funds Act (UPMIFA) Conundrums: Issues in Making and Managing Charitable Gifts” (panel participant). ACTEC Annual Meeting, Boca Raton, Florida, March 8, 2020.

“2019 Legislative Update: Oregon Nonprofit Corporation Act” (co-presenter). Advanced Advising and Advocacy for Nonprofit Entities, Oregon State Bar and Nonprofit Organizations Law Section, Feb. 6, 2020.

“Oregon Update: Cases and Legislation.” 49th Annual Estate Planning Seminar, Portland Estate Planning Council, Portland, Oregon, January 24, 2020.

“Electronic Wills Act: Because Paper Is So 20th Century.” Through the Looking Glass XVI, California State University, Channel Islands, California, January 23, 2020.

“Electronic Wills Act” (panel participant). Association of American Law Schools Annual Meeting, Washington, D.C., January 4, 2020.

“Electronic Wills Act: Because Paper Is So 2oth Century.” 64th Annual Estate Planning Seminar, Seattle, Washington, November 19, 2019.

“Oregon 2019 Legislation and 2018-19 Cases.” Lane County Bar Association, Probate Committee. Eugene, Oregon, November 12, 2019.

“Impact Investing and ESG Integration” (panel participant). 56th Annual Hawaii Tax Institute, Honolulu, Hawaii, November 6, 2019.

“Worrying about Warehousing: Spend Rate, Limited Life, and Endowments.” National Center on Philanthropy and the Law, Conference on Reconsidering Private Foundations After Five Decades: Lessons for the Future, New York, New York, October 24, 2019.

“Harmless Error: What Errors Are Harmless” (panel participant). Advanced Estate Planning, Oregon State Bar, Portland, Oregon, June 14, 2019.

“Oregon Stewardship Trusts: A New Model for Mission-Driven Businesses.” Univ. of Cincinnati Symposium: The Business Uses of Trusts, Cincinnati, Ohio, March 15, 2019.

“Fiduciary Duties and ESG Investing.” Net Impact (Lundquist School of Business, University of Oregon), Eugene, Oregon, February 20, 2019.

“Impact Investing” (panel participant). 55th Annual Hawaii Tax Institute, Honolulu, Hawaii, November 7, 2018.

Testimony before Wisconsin Legislative Committee formed to study the investment and use of Wisconsin school trust funds, governed by UPMIFA. Telephonic participation, October 11, 2019.

“Impact Investing for Trusts.” New Hampshire Estate Planning Council, Manchester, New Hampshire, May 9, 2018.

“Electronic Wills” (co-presenter). Estate Planning and Probate Section of the Alaska Bar, telephonic presentation, March 13, 2018.

“Update on Digital Asset Legislation and Electronic Wills throughout the US” (co-presenter). ABA Digital Property Group, telephonic presentation, February 13, 2018.

“Oregon Update: Cases and Legislation.” Portland Estate Planning Council. Portland, Oregon, February 9, 2018.

“Oregon Update: 2017.” Lane County Bar Association, Probate Committee. Eugene, Oregon, December 12, 2018.

“Oregon Update: Cases and Legislation.” Seattle Estate Planning Council. Seattle, Washington, November 10, 2017.

“Sustainability: Adoption, Performance and Fiduciary Responsibility” (panelist). DCIIA Academic Forum. New York, New York, October 19, 2017.

“Legal Requirements for Charitable Nonprofit Organizations – an Overview.” 2017 Active 20-30 National and International Convention. Eugene, Oregon, July 14, 2017.

“Rules of Plan Engagement: Keep It Simple, Suitable, ‘Sustainable’” (panelist). P&I Global Future of Retirement Conference. New York, New York, June 26, 2017.

“Roles and Responsibilities of Fiduciaries.” Investing in the Age of Climate Change. University of Oregon, Eugene, Oregon, April 28, 2017.

“Making Money While Here for Good: Impact Investing from the Fiduciary’s Viewpoint,” and “Uniform Prudent Management of Institutional Funds Act: UPMIFA in Texas.” The Dallas Foundation: 20th Annual Professional Advisor Seminar, Dallas, Texas, February 3, 2017.

“Oregon Update: 2016.” Lane County Bar Association, Probate Committee, Eugene, Oregon, February 14, 2017.

“Oregon Update: 2016.” Portland Estate Planning Council, Portland, Oregon, January 20, 2017.

“Feel Good Doing Good: Impact Investing When Settlors and Beneficiaries Want to Do More than Make Money.” Heckerling Institute on Estate Planning, Orlando, Florida, January 11, 2017.

“It’s Hard to Be Good: Fiduciary Duties and Impact Investing” (panelist). Heckerling Institute on Estate Planning, Orlando, Florida, January 11, 2017.

“History and Policy: Who Should Control Charitable Gifts?” National Center on Philanthropy and the Law, 28th Annual Conference, New York, New York, October 27, 2016.

“Prudent Investing by Charities and Private Trusts: Fiduciary Duties, ESG Investing, and Impact Investing.” Portland Estate Planning Council, Portland, Oregon, September 21, 2016.

“Using Mediation and Arbitration to Manage Family Conflict and Resolve Trust and Estate Disputes.” Oregon State Bar, Advanced Estate Planning and Administration 2016, Portland, Oregon, June 10, 2016.

“ESG Investing: Environmental, Social and Governance Standards and the Prudent Investor Standard,” Sustainable Future Section of the Oregon State Bar, Portland, Oregon, March 28, 2016.

“Probate Modernization.” Lane County Bar Association, Probate Committee, February 9, 2016.

“Endowment Spending, ESG Investing, and Fiduciary Responsibility.” Foundation Leadership Forum, Association of Governing Boards, Los Angeles, California, January 26, 2016.

“Socially Responsible Investing” (panelist). Post-Conference Workshop, Foundation Leadership Forum, Association of Governing Boards, Los Angeles, California, January 26, 2016.

“Oregon Update: A Review of 2015 Cases and Legislation and a Look at Legislation Coming in 2016.” Eugene Estate Planning Council, Eugene, Oregon, January 12, 2016.

“Sustainable Investing and the Responsible Fiduciary” (panelist). Intentionally Designed Endowment Forum, Portland, Oregon, November 9, 2015.

“ESG Investing Q&A.” Foundation Legal Counsel Group of the Association of Governing Boards, telephonic presentation, October 8, 2015.

“Uniform Prudent Management of Institutional Funds Act (UPMIFA) After Nine Years: Lessons Learned and Emerging Problems” (with Terry Knowles). Webinars sponsored by American Bar Association, Real Property, Trust & Estate Law Section, July 8, 2015; Institutional Investors Committee of the Business Law Section, September 29, 2015.

“From SRI to ESG: Using Environmental, Social and Governance Factors as Part of a Charity’s Investment Strategy.” Advanced Topics in Nonprofit Law, Nonprofit Organizations Law Section and the Oregon State Bar, Lake Oswego, Oregon, September 18, 2015.

“Using Mediation and Arbitration to Manage Family Conflict.” ACTEC 2015 Rocky Mountain Regional Meeting, Big Sky, Montana, September 13, 2015.

“Fiduciary Duties of Managers of Charitable Investment Assets – U.S. Legal Rules and Challenges.” 2015 Asia-Pacific Area Social Law Conference, Wenzhou, China, March 21, 2015.

“The American Law of Donor-Restricted Charitable Gifts: Problems of Interpretation and Enforcement.” University of Hong Kong, Hong Kong, China, March 19, 2015.

“Restricted Charitable Gifts: Drafting Agreements that Stand the Test of Time.” Panelist, Heckerling Institute on Estate Planning, Orlando, Florida, January 14, 2015.

“Uniform State Laws – UPMIFA.” Webinar sponsored by The Regulatory Fundamentals Group, December 17, 2014.

“UPMIFA – Emerging Problems” (panelist). Conference of the National Association of State Charities Officials, Washington, D.C., October 6, 2014.

“Investment Strategies and Institutional Values: How, Why and at What Risk?” (panelist). 2014 Climate Leadership Summit sponsored by ACUPCC, Boston, Massachusetts, October 3, 2014.

“Donor Intent and Donor Standing” (panelist). American Bar Association, Real Property, Trust & Estate Law Section, Spring Symposia, New York, New York, May 1, 2014.

“Sustainable Investing and the Responsible Fiduciary” (panelist). Intentionally Designed Endowment Conference, Cambridge, Massachusetts, April 3-4, 2014.

“Beyond Kumbaya: What Trust and Estate Lawyers Need to Know about Mediation” (panelist). ACTEC Annual Meeting, Tucson, Arizona, March 8, 9, 2014.

“Oregon Update.” 43nd Annual Estate Planning Seminar, Estate Planning Council of Portland, Portland, Oregon, January 31, 2014.

“Tax Planning for Same-Sex Couples in the Post-Windsor World,” Eugene Tax Association, Eugene, Oregon, January 28, 2014.

“Nothing Lasts Forever – Or Does It? Perpetual Charitable Gifts Are OK, But What About Donor Intent?” (panelist). ACTEC Summer Meeting, Philadelphia, Pennsylvania, June 22, 2013.

“Probate Mediation Clinic – A Faculty Member’s Perspective” (panelist). Annual Meeting, ABA Section on Dispute Resolution, Chicago, Illinois, April 6, 2013.

“Definitions of Children and Descendants: Construing and Drafting Wills and Trust Instruments.” Texas Tech University School of Law’s Annual Estate Planning and Community Property Law Seminar, Lubbock, Texas, March 1, 2013.

“Oregon Update.” 42nd Annual Estate Planning Seminar, Estate Planning Council of Portland, Portland, Oregon, February 8, 2013.

“Drafting Definitions of Children and Descendants” (panelist). The Brave New World of ART Children: Special Issues in Estate Planning and Administration, 47th Annual Heckerling Institute on Estate Planning, Orlando Florida, January 16, 2013.

“Oregon Update.” Lane County Bar Probate Committee, Eugene, Oregon, January 8, 2013.

“Drafting Definitions of Children and Descendants.” 10th Annual Sophisticated Trusts and Estates Law Institute, New York, New York, November 8, 2012.

“UPMIFA Update.” Annual Meeting of the University Foundation Legal Counsel of the Association of Governing Boards of Universities and Colleges, Portland, Oregon, September 13, 2012.

“The Prudent Investor Rule and Charities” (panelist). The ALI’s Prudent Investor Rule 20 Years On (and after the Financial Crisis), American Law Institute, Annual Meeting, Washington, D.C., May 20, 2012.

“UPMIFA” (panelist). Next Generation Philanthropy/Nonprofit Governance, American Bar Association, Real Property, Trust & Estate Law Section, Spring Symposia, New York, New York, May 3, 2012.

“Charities and Donor Intent: Interpretation, Enforcement, and Doing the Right Thing.” Southern Washington Estate Planning Council, Vancouver, Washington, February 21, 2012.

“Oregon Update.” Southern Oregon Estate Planning Council, Medford, Oregon, February 9, 2012.

“Oregon Update.” 41st Annual Estate Planning Seminar, Estate Planning Council of Portland, Portland, Oregon, February 3, 2012.

“Uniform Prudent Management of Institutional Funds Act: UPMIFA and NYPMIFA.” 9th Annual Sophisticated Trusts and Estates Law Institute (keynote speaker), New York, New York, November 17, 2011.

“The Probate Definition of Family.” Symposium: The Uniform Probate Code: Remaking of American Succession Law. Ann Arbor, Michigan, October 21, 2011.

“Charities and Donor Intent: Interpretation, Enforcement, and Doing the Right Thing.” New Hampshire Charitable Foundation, Manchester, New Hampshire, October 7, 2011.

“Model Protection of Charitable Assets Act.” Association of Governing Boards, 2011 Meeting of University Foundation Counsel, Boston Massachusetts (by conference call), September 15, 2011.

“What Did the Bishops Intend?” Eugene Roundtable, Eugene, Oregon, Jan. 11, 2011.

“Oregon Hot Topics/Development Update.” 55th Annual Estate Planning Seminar. Seattle, Washington, Oct. 2, 2010.

“Being a Reporter.” Panel participant in training session for new reporters and drafting committee chairs, Uniform Law Commission, Chicago, Illinois, Sept. 11, 2010.

“Drafting for Donor Intent – Enforcing Donor Intent.” Portland Estate Planning Council, Portland, Oregon, May 12, 2010.

“Uniform Oversight of Charitable Assets Act” (panelist). American Bar Association, Real Property, Trust & Estate Law Section, Spring Symposia, Philadelphia, Pennsylvania, May 7, 2010.

“The Problems with Donor Intent: Interpretation, Enforcement, and Doing the Right Thing.” Symposium: The Law of Philanthropy in the 21st Century, Chicago, Illinois, Oct. 23, 2009.

“Oregon Hot Topics/Development Update.” 54th Annual Estate Planning Seminar, Seattle, Washington, Oct. 2, 2009.

“All the Good Stuff: Powers of Attorney, Jurisdiction for Guardianships and Conservatorships, Accounting for Endowment Funds, and Tax Amnesty.” Eugene-Springfield Tax Association, Eugene, Oregon, Sept. 29.

“Being a Reporter.” Panel participant in training session for new reporters and drafting committee chairs, Uniform Law Commission, Chicago, Illinois, Sept. 12, 2009.

“Drafting for Donor Intent.” NYSBA Trust and Estates Law Section Spring Meeting, Amelia Island, Florida, Mar. 20, 2009.

“Uniform Prudent Management of Institutional Funds Act (UPMIFA).” Uniform Law Commission, Honolulu, Hawaii, Nov. 21, 2008.

“Uniform Prudent Management of Institutional Funds Act (UPMIFA).” Marquette University, Milwaukee, Wisconsin, Oct. 3, 2008.

“Being a Reporter.” Panel participant in training session for new reporters and drafting committee chairs, Uniform Law Commission, Chicago, Illinois, Sept. 20, 2008.

“Uniform Prudent Management of Institutional Funds Act.” Educational presentation at the Torch Club, sponsored by the Uniform Law Commission. New York, New York, Sept. 19, 2008.

“Developments in Model State Laws” (panelist). Joint Meeting of the Tax and Real Property, Trust and Estate Sections of the ABA, San Francisco, California, Sept. 12, 2008.

“Investing for Public Benefit: MRIs, PRIs, and Other Developments in Private Foundation Investments” (panelist). Joint Meeting of the Tax and Real Property, Trust and Estate Sections of the ABA, San Francisco, California, Sept. 12, 2008.

“Probate is Dead or Is It?” (panelist). ABA teleconference (140 people registered), May 21, 2008.

“Gift Restrictions, Investment Policies, and Prudent Management.” The Conference on Charitable Giving, Stanford University, Palo Alto, California, May 13, 2008.

“Uniform Prudent Management of Institutional Funds Act (UPMIFA) – New Funds Management Law.” 2008 OSCPA Not-for-Profit Conference, Portland, Oregon, May 9, 2008.

“Is Mission Investing Prudent?” Socially Responsible Investing: Prudent or “Im”? New York University, National Center on Philanthropy and the Law and TIFF Education Foundation, New York, New York, May 8, 2008.

“Real Property Transfer on Death: A Uniform Act in Progress” (panelist). American Bar Association, Real Property, Trust & Estate Law Section, Spring Symposia, Washington, D.C., May 1, 2008.

“Issues that May Trigger AG Involvement: Investment Issues and Donor Restrictions.” Charities Law Conference, National State Attorneys General Program, Charities Regulation Project, Columbia University, New York, New York, March 28, 2008.

“UPMIFA and Endowment Reporting” (panelist). Webcast sponsored by NACUBO (National Association of College and University Business Officers – 260 institutions registered), March 20, 2008.

“UPMIFA Update” (keynote speaker). 8th Annual Rocky Mountain Endowment and Foundation Conference, Denver, Colorado, March 13, 2008. (Presented to a second group of foundation managers and lawyers the following day, March 14).

“Uniform *Prudent* Management of Institutional Funds Act: Coming Soon to Colorado!” Foundation Tax Group, Denver, Colorado, February 26, 2008.

“The Law of Succession in the 21st Century” (moderator). Symposium held at UCLA, Los Angeles, California, February 8, 2008.

“Roundtable on Nonprofit and Philanthropy Law Scholarship” (panelist). Association of American Law Schools, Annual Meeting, New York, New York, January 6, 2008.

“UPMIFA Educational Program.” Seattle, Washington, December 6, 2007.

“Uniform Management of Institutional Funds Act.” Western Conference on Tax-Exempt Organizations, Los Angeles, California, November 15, 2007.

“UPMIFA Educational Program.” Non-Profit Committee of the Bar Association of Metropolitan St. Louis, St. Louis, Missouri, November 9, 2007.

“Legislative Update.” Eugene-Springfield Tax Association, Eugene, Oregon, October 30, 2007.

“What’s Up with UPMIFA?” Emerald Valley Development Professionals, Eugene, Oregon, October 9, 2007.

“What’s Up with UPMIFA?” Southwest Association of Lutheran Development Executives, Las Vegas, Nevada, Oct. 2, 2007.

“Being a Reporter.” Panel participant in training session for new reporters and drafting committee chairs. National Conference of Commissioners of Uniform State Laws, Chicago, Illinois, Sept. 14, 2007.

“Legislative Update.” Hot Topics in Estate Planning, Oregon State Bar, Portland, Oregon, June 15, 2007.

“Uniform Management of Institutional Funds Act.” Tax Section, American Bar Association, Washington, D.C., May 11, 2007.

“What’s Up with UPMIFA?” National Association of College and University Business Officers, Chicago, Illinois, April 16, 2007.

“Uniform Prudent Management of Institutional Funds Act.” Hot Buttons on the New Uniforms: The Controversial Provisions of the UTC, UPOAA and UPMIFA, American College of Trust and Estate Counsel, Annual Meeting, Scottsdale, Arizona, March 8, 2007.

“What’s Up with UPMIFA?” the Austin Heberger Group of Smith Barney, Pasadena, California, February 1, 2007.

“Roundtable on Teaching Nonprofit Law” (moderator and speaker). Association of American Law Schools, Annual Meeting, January 5, 2007.

“Uniform Prudent Management of Institutional Funds Act.” State-Level Legal Reform of the Law of Nonprofit Organizations, Association of American Law Schools, Annual Meeting, January 5, 2007.

“Respecting Donor Intent: Why and How Much?” ARNOVA Annual Meeting, Chicago, Illinois, November 2006.

“What’s Up with UPMIFA?” Central Oregon Estate Planning Council, Bend, Oregon, September 2006.

“Understanding the New Uniform Prudent Management of Funds Act.” 8th Annual Not for Profit Educational Seminar, Smith Barney, Seattle, Washington, June 2006.

“Fiduciary Responsibility: New Tax-Exempt Rules of the Road.” The Winds of Change: How Will Endowments and Foundations Respond?” Institutional Investor Institute, Boston, Massachusetts, June 2006.

“The Oregon Uniform Trust Code: Something Old, Something New, and a Few Surprises.” Portland Estate Planning Council, May 2006.

“UPMIFA: What’s Up for Charities?” Nonprofit Fiduciaries, Smith Barney, Portland, Oregon, May 2006.

“What’s New on the Legislative Front for Charities?” 5th Annual Western Division Advanced Institutional Workshop, San Francisco, California, March 2006.

“Defining the Parent-Child Relationship for Estate Planning Purposes.” What Is Family? New Issues Confronting the Estate Planner in the 21st Century, Philadelphia Bar Association, Philadelphia, Pennsylvania, December 2005.

“The Oregon Uniform Trust Code.” Administering Trusts in Oregon, Oregon State Bar, Portland, Oregon, November 2005.

“Respecting Donor Intent: Why and How Much.” National Center on Philanthropy and the Law, 17th Annual Conference, New York, New York, October 2005.

“Estate Planning and Administration.” 2005 Legislation Highlights, Oregon State Bar, Salem, Oregon, September 2005.

“The Uniform Management of Institutional Funds Act (UMIFA): A New Look.” American Bar Association, Real Property, Probate & Trust Law Section, Spring Symposia, Washington, D.C., April 2005.

“The Uniform Management of Institutional Funds Act: Proposed Changes, Rationales, and Ramifications.” 13th Annual CASE Conference for Institutionally Related Foundations: New Approaches to Best Practices, Council for Advancement and Support of Education, La Jolla, California, March 2005.

“The Law of Conservation Easements.” Public Interest Environmental Law Conference. Eugene, Oregon, March 2005.

“Mediation in Probate.” Probate Committee of the Lane County Bar Association. Eugene, Oregon, February 2005.

“Defining Parent and Child for Intestacy Purposes” (moderator and panelist). Association of American Law Schools annual meeting, San Francisco, California, January 2005.

“Fundamental Planning for the Taxable Estate.” Planning the Taxable Estate, Oregon State Bar, Portland, Oregon, November 2004.

“Rethinking the Definition of Parent and Child.” Symposium on Bioethics, Real Property Probate & Trust Law Section of the American Bar Association, Tampa, Florida, October 2004.

“Advising Charities and Donors under Revised UMIFA” (program moderator and panelist), American Bar Association, Real Property Probate & Trust Law Section, Spring Symposia, Seattle, Washington, May 2004.

“Revisions to the Uniform Management of Institutional Funds Act.” Tailoring the Uniforms, American College of Trust and Estate Counsel, Annual Meeting, San Antonio, Texas, March 2004.

“Investment of Corporate Funds.” New Developments Affecting Nonprofit and Tax-Exempt Organizations, University of Washington School of Law, Seattle, Washington, March 2003.

“Inheritance and Changing Families.” Universität Freiburg, Freiburg, Germany, July 2001.

“Extending Revocation on Divorce to Will Substitutes.” Association of American Law Schools Workshop on Defining the Family in the Millennium, Palm Springs, California, March 2001.

“The Parent-Child Relationship Under Intestacy Statutes.” Association of American Law Schools Workshop on Defining the Family in the Millennium, Palm Springs, California, March 2001.

“Skills Training for Estate Planners” (with Jeffrey N. Pennell). American Bar Association course, Atlanta, Georgia, June 2000.

“Adapting Intestacy Laws to Changing Families.” Law and Society Association annual meeting, Miami Beach, Florida, May 2000.

“Personal Life: Family, Probate and Community Disputes” (panel participant). Beyond the Casebook: Problem Solving Skills and Appropriate Dispute Resolution, University of Oregon School of Law, February 2000.

“The Greatest Heritage Is the Love of a Family: Using Mediation to Resolve Probate Disputes” (panel organizer and participant). Association of American Law Schools annual meeting, Washington, D.C., January 2000.

“Probate and Trust Literature.” American Bar Association annual meeting, Atlanta, Georgia, August 1999.

“Probate and Trust Literature.” American Bar Association annual meeting, Toronto, Canada, August 1998.

“The Federal Estate and Gift Tax System.” Oregon State Bar seminar, Portland, Oregon, October 1997.

“Ethics in Estate Planning.” Lane County Bar Association meeting, Eugene, Oregon, September 1997.

“Probate and Trust Literature.” American Bar Association annual meeting, San Francisco, California, August 1997.

“Recent Developments in State and Local Regulation of Nonprofit Organizations.” American Bar Association annual meeting, San Francisco, California, August 1997.

“Probate and Trust Literature.” American Bar Association annual meeting, Orlando, Florida, August 1996.

“Teaching the Elective Share as Part of the Basic Trusts and Estates Curriculum.” American Bar Association annual meeting, Chicago, Illinois, August 1995.

“Running the Nonprofit Business: Unrelated Business Income.” Law Forum Committee of the Lane County Bar Association seminar, Eugene, Oregon, May 1992.

“The Tax Consequences of Charitable Giving.” International Association of Financial Planners seminar, Chicago, Illinois, May 1987.

“Charitable Giving.” Loyola University School of Law Estate Planning course, Chicago, Illinois, February 1987.

“Deferred Giving Techniques.” Board of Directors of LaRabida Children's Hospital and Research Center meeting, Chicago, Illinois, December 1986.

“Trustee Liability” and “The New Illinois Not for Profit Corporation Act.” Institute for the Management of Not for Profit Organizations, Lewis University School of Management seminar, Oak Brook, Illinois, November 1986.

“Fiduciary Responsibilities of Directors.” United Way of Chicago workshop, Chicago, Illinois, January 1984.

“Estate Planning.” American Red Cross (Mid-American Chapter) estate planning workshops, Chicago, Illinois, May 1983.

# GRANTS

ACTEC Foundation three-year grant, 2018. Grant to support Wills for the Underserved mentorship program at the University of Oregon School of Law.

Academic Writing Resident Fellow at the Bellagio Center, Rockefeller Foundation, August 22 – September 19, 2017, “Evolution of the Prudence Standard:  ESG Investing, Ethical Investing, and Fiduciary Duties.”

2013 Summer Research Grant, University of Oregon School of Law, “Contemporary Approaches to Trusts and Estates.”

2012 Summer Research Grant, University of Oregon School of Law, “Definitions of Children and Descendants in Wills and Trusts: Who is a Parent and Who is a Child?”

2011 Summer Research Grant, University of Oregon School of Law, “The Probate Definition of Family: A Proposal for Guided Discretion in Intestacy.”

2010 Summer Research Grant, University of Oregon School of Law, “Contemporary Approaches to Trusts and Estates.”

2009 Summer Research Grant, University of Oregon School of Law, “Socially Responsible Investing by Charities.”

2005 Summer Research Grant, University of Oregon School of Law, “Respecting Donor Intent: The Charity’s Role in Charitable Giving.”

2004 Luvaas Faculty Fellow, University of Oregon School of Law, “Revised UMIFA: Prudent Investing for Charities.”

2002 Summer Research Grant, University of Oregon School of Law, “Applying Revocation on Divorce Statutes to Will Substitutes.”

1999 Summer Research Award, University of Oregon, “Regulating the Management of Nonprofit Organizations: Bridging the Divide Between Trust Law and Corporate Law Approaches.”

1998 Luvaas Fellowship, University of Oregon School of Law, “Intestacy Laws and Stepfamilies.”

1996 Love, Moore, Banks, Grebe Endowment, University of Oregon School of Law.

1995 Summer Research Grant, University of Oregon School of Law.

1994 Summer Research Grant, University of Oregon School of Law.

1993 New Faculty Award, University of Oregon.

**UNIVERSITY/SCHOOL OF LAW SERVICE (UNIVERSITY OF OREGON)**

University

University of Oregon Board of Trustees, Trustee (2013-2017)

Ad Hoc Committee on Ethical Endowments (2016-2017) (developed a full-day forum: Investing in the Age of Climate Change, April 28, 2017)

University COI-COC Policy Revision Committee (2018-19)

University-wide Diversity Committee, 2013-14

Diversity Plan Review Committee, 2012

Faculty Governance Workgroup, 2009-11 (group that revised the University Constitution)

Diversity Advisory Group, 2008-11

Grievance Counselor, 2011

Diversity Proposal Review, chair, 2008

Executive Diversity Working Group, co-chair, 2005-06

Law School Dean Search Committee, 2005-06

University Senate, 2004-2006; 2017-2019; Senate Executive Committee, 2004-05, 2012-13

Women’s and Gender Studies Committee, 2004-07

Intercollegiate Athletics Committee, 2002-04

Scholarship Committee, 2001-03

Nonprofit Center, plan development with Renee Irvin, 2002-11

Development of Oregon Entrepreneurial Nonprofit Symposium, with Renee Irvin and St. Vincent DePaul, (one-week symposium held 2006, 2007, 2008)

International Students Tax Advising, 1989-97

Law School

Search Committee for Oregon Law Commission Director, 2018

Wills for the Underserved, program founder and supervisor, 2016-present

Academic Standing Committee, Dec. 2017 – Jan. 2018

Community and Inclusion Committee, 2016-2017

Lectures and Awards Committee, 2015-16

Search Committee for LL.M. Director, 2014

University Program Review, chair, 2013

LL.M. Advisory Committee, 2013-14

LL.M Review Committee, 2012-13

LL.M Faculty Director, 2006-08

Academic & Professional Success Committee, 2012-13

Search Committee of Nonprofit Clinic Director, chair, 2012

Course Development Committee, chair, 2007-08

Diversity Committee, co-chair, 2006-07, ex officio, 2007-08, chair, 2008-11,

member 2011-14, 2015-2017

Diversity coordinator, 2007-08

Dean’s Faculty Advisory Committee, 2001-02; 2004-05; ex officio, 2006-08; 2012-13, 2015-16

Search Committee for Director of LL.M. Program, chair, 2007; member, 2014

Search Committee for Asst. Dean for Student Affairs, 2007

Curriculum Committee, co-chair, 2005-2006; member, 2006-07, 2013-14, 2018-2019

ABA Self Study and Site Visit, member, 2006-07

Faculty Appointments Committee, member, 2001-02; chair, 2003-04; chair, 2006-07; member, 2008-10; 2011-12; 2016-2017; 2019-2020

Faculty Personnel Committee, 2002-04, 2008-12, 2015-16

Search Committee for Admissions Director, 2004

Pro Bono Committee, 2002-03

Search Committee for Finance Director, 2002-03

Law School Admissions Committee, 1993-96; 1997-2000; chair, 1994-96; 1998-2000

Estate Planning Statement of Completion, advisor, 1992-present

Faculty Advisor, 1993-present

Emerging Business/Nonprofit Clinic Task Force, 1998-99

Law and Entrepreneurship Advisory Committee, 1996-97

Family Law Clinic, supervisor, 1997

Computer Policy Committee, 1996-1997

Law School Lectures and Awards Committee, 1996-97

Women’s Law Forum, conference panelist 1993, 1994, 1996, panel moderator 1999; faculty supervisor 2004-05

# COMMUNITY SERVICE

EC Brown Advisory Board, 2019-present

Eugene Concert Choir Board, 2021-present

Maude Kerns Art Center, board presentation on fiduciary duties, 2004

Oregon Research Institute, member, Board of Directors, 1999-2004 (on leave, 2000-2001)

Lane Arts Council, nonprofit presentation, 2003

Oregon Law Students Public Interest Fund, nonprofit advice, 1999-2000

American Quaternary Association, nonprofit advice, 1999-2000

Amigos de los Sobrevivientes, nonprofit advice, 1994, 1996, 1998

Congregational Nursery School, nonprofit advice, 1994

Lane County Geographical Society, nonprofit advice, 1994

Fox Hollow Elementary School, parent volunteer, 1993-2000

# PROFESSIONAL CERTIFICATIONS

Admitted to practice law in Illinois, 1981, currently inactive

Admitted to practice law in Oregon, 1989, currently inactive

# PROFESSIONAL MEMBERSHIPS

American College of Trust and Estate Counsel, Academic Fellow since 2001

American Law Institute, Member since 2017

American Law Foundation, Fellow since 2009

American Bar Association

Real Property, Trust and Estate Law Section

Oregon State Bar Association

Estate Planning and Administration Section

Elder Law Section

Nonprofit Organizations Law Section

Lane County Bar Association

Probate Committee

Eugene Roundtable, elected member since 2006

**PERSONAL**

Past nonprofessional work experiences include carillonneur, tour guide, library assistant, circus clown, and office assistant in a bank. Working knowledge of French.