

# CURRICULUM VITAE

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**NANCY E. SHURTZ**  
**Bernard A. Kliks Chair**  
University of Oregon  
School of Law  
Eugene, Oregon 97403

## EDUCATIONAL HISTORY

- 1976-77 LL.M. (Taxation), Georgetown University Law Center, Washington, D.C.
- 1970-72 J.D., Ohio State University, College of Law, Columbus, Ohio, December, 1972  
National Law Center, Washington, D.C. summer of 1972  
Notre Dame Law School, summer program, London, England, 1971
- 1966-70 B.A. (Political Science), University of Cincinnati, Cincinnati, Ohio  
Harvard University, Cambridge, Massachusetts, summer of 1968  
Chapman College, World Campus Afloat, 1969-1970 academic year

## PROFESSIONAL EXPERIENCE

### ***August 1982 to the present***

**PROFESSOR, UNIVERSITY OF OREGON SCHOOL OF LAW (EUGENE, OREGON)**  
Courses taught: Individual Income Tax; Corporate Tax; Accounting for Lawyers; State and Local Tax; Business Planning; Partnership Tax; Tax Policy; Gift and Estate Tax; Estate Planning; Professional Responsibility; Women and the Law; Poverty Law; Tax Planning & Drafting, Sustainable Tax & Business Practice; Environmental Policy; Marketplace Economics.

### ***July 1978 to July 1982***

**ASSOCIATE PROFESSOR, WHARTON SCHOOL, DEPARTMENT OF LEGAL STUDIES, UNIVERSITY OF PENNSYLVANIA, (PHILADELPHIA, PENNSYLVANIA)**  
Courses taught: Legal Aspects of Commercial Transactions; Administrative Regulation of Business; Introduction to Law; Law of Antitrust and Trade Regulations; Seminar in Tax Policy.  
Course taught in Liberal Studies Program, School of Education: Science as the Basis of Public Policy.

### ***Aug 2009 to July 2010 and Spring 2011***

**VISITING PROFESSOR, STETSON LAW SCHOOL, (GULFPORT, FLORIDA)**  
Courses taught: Federal Income Tax I; Federal Income Tax II; Corporate Taxation; Partnership Taxation; Estate Planning.

**July 1977 to July 1978**

**ASSOCIATE, GINSBURG, FELDMAN & BRESS, (1700 PENNSYLVANIA AVE., N.W., WASHINGTON, D.C.)**

Area of practice: Tax Department and Energy Department.

**January 1973 to June 1977**

**ASSOCIATE PROFESSOR, DEPARTMENT OF ACCOUNTING AND BUSINESS LAW, UNIVERSITY OF TENNESSEE, (KNOXVILLE, TENNESSEE)**

Courses Taught: Introduction to the Law; Contracts; Corporations & Partnerships; Administrative Law; Income Tax; Corporate Tax; Estate and Gift Tax.

**Summer, 1973**

**LAW CLERK, FRASE & WEIR, (305 MAIN STREET, COSHOCTON, OHIO)**

General practice.

**HONORS**

Advisory Panel for *Feminist Judgments: Rewritten Tax Opinions* (2016-2017)  
Nominated for the University of Oregon Martin Luther King Award (2011-2012)  
Dean's Distinguished Faculty Fellowship 2006-2008  
Bernard Kliks Chair 2008 to present

**NATIONAL COLUMNIST**

Fall, 1990 to present - Estate Planning Magazine

**VOLUNTEER CONSULTANT**

Spring, 2005, Mills College (Oakland, California) – All Women's Law School

**PROFESSIONAL MEMBERSHIPS**

- \* American Bar Association
  - Tax Section
    - Member (1987 - present)
    - CLE Programming Committee
      - Vice-Chair (1994 - 1998)
  - Real Estate, Trust and Estate Law Section
    - Member (1987 - present)
      - Significant Literature Committee
      - Vice-Chair (1987 - 1989)
      - Chair (1989 - 1994)
    - Senior Editor, Books and Media (1994 - present)
    - Publications Committee (2006 - present)

- \* American Accounting Association
- \* American Tax Association
- \* Eugene Estate Planning Council
- \* Eugene-Springfield Tax Association
- \* Lane County Bar
- \* Ohio Bar Association (admitted to Ohio bar, May 5, 1973, currently inactive)
- \* Oregon State Bar Association (admitted to Oregon bar, April 4, 2000, currently inactive)
- \* Oregon Women Lawyers
- \* Tennessee Bar Association (admitted to Tennessee bar, Sept. 22, 1973, currently inactive)
- \* Washington D.C. Bar Association (admitted to D.C. bar, Nov. 14, 1977, currently inactive)

## **PUBLICATIONS**

### ***Books***

529 Plans: What Every Advisor Needs to Know, (co-authored with Alexander B. Fitch and Robert Tirrell) American Bar Association (forthcoming in 2021).

Teacher's Manual for Sustainability and Business Law (2019).

Emanuel Law Outlines: Basic Federal Income Tax, (5<sup>th</sup> Ed.) Wolters Kluwer. (co-authored with Gwendolyn Griffith Lieuallen) (2018).

Emanuel Crunch Time: Your Exam Study Partner for Basic Federal Income Tax, Wolters Kluwer. (co-authored with Gwendolyn Griffith Lieuallen) (2018).

Sustainability and Business Law, (co-authored with Judd Sneirson), Carolina Academic Press (2017).

Education Planning: Taxes, Trusts & Techniques, American Bar Association (2009).

Corporate Tax, Volumes 1 and 2, Shepard's McGraw Hill, Inc., co-authored with Michael Durst, Gwendolyn Griffith, and James O'Hara (1992).

### ***Books in Progress***

Keeping Faith and Values with Estate Planning, (American Bar Association) (forthcoming in 2021).

Navigating Life, co-authored with Alexander B. Fitch (series of three books— forthcoming in 2021).

### ***Chapters in Books (and Borchures)***

Seven T&E Client Brochures, American Bar Association, 2018.

“Chapter 9: Nontax Considerations in Testamentary Transfers to Minors,” American Bar Association (Real Estate, Trust and Estate Law Section) in book entitled Tax, Estate, and Lifetime Planning For Minors (co-authored with Susan Gary) [First Edition, 2006; Second Edition, 2019.]

“Chapter 11: Federal Income Tax” in Teaching the Law School Curriculum, edited by Steve Friedman, Gerald Hess and Stephen Sopinich, Carolina Academic Press, [Excerpts on the following: “Goals, Philosophy, and Coverage, pp. 231-232; Text and Handouts, pp. 243-244; Role-Playing, p. 248; Cartoons, p. 249; Research Paper, Midterm, Final Exam, p. 252] (2004).

### **Articles**

“Tax, Class, Women, and Elder Care,” 43 Seattle University Law Review 97-167 (2019).

“Long-Term Care and the Tax Code: A Feminist Perspective on Elder Care,” 20 Georgetown Journal of Gender and the Law 107-194 (2018).

“Seeking Citizenship in the Shadow of Domestic Violence: The Double Bind of Proving ‘Good Moral Character’,” 62 St. Louis U. L.J. 237-260 (2017).

“Carbon Pricing Initiatives in Western North America: Blueprint for Global Change Policy,” 7 San Diego J. Climate & Energy L. 61-142 (2016).

“The TurboTax Defense,” (co-authored with Rodney Mock) 15 Florida Tax Rev. 443-532 (2014).

“Eco-Friendly Building From the Ground Up: Environmental Initiatives and the Case of Portland Oregon,” 27 J. of Environmental Law & Litigation 237-362 (2012).

“Sweden, Singapore and the States: A Comparative Analysis of the Impact of Taxation on the Welfare of Working Mothers,” 55 St. Louis U. L.J. 1087-1132 (2011).

“Lighting the Lantern: Visions of a Virtual All Women’s Law School,” 16 Hastings Women’s Law Review 63-116 (Winter 2005).

“Critical Tax Theory: Still Not Taken Seriously,” 76 University of North Carolina Law Review 1837-1888 (June 1998).

“Gender Equity and Tax Policy: The Theory of ‘Taxing Men,” 6 Southern California Review of Law and Women’s Studies 485-532 (Spring 1997).

“The Top Ten Twisted Tax Travesties in the Taxpayer Relief Act of 1997,” 76 Tax Notes 1777-1781 (Sept. 29, 1997).

“Twenty Questions - And Answers - About Retirement Counseling,” 41 The Practical Lawyer 59-71 (Spring 1995).

- "An Academic's View of Tax Basis Revocable Trusts," 134 Trusts & Estates 43-49 (Jan. 1995).
- "A Critical View of Traditional Tax Policy Theory: A Pragmatic Alternative," 31 Villanova Law Review 1665-1701 (1986).
- "State Taxation of Energy Resources: Are Consuming States Getting Burned?" 36 Vanderbilt Law Review 55-102 (1983).
- "Promoting Alcohol Fuels Production: Tax Expenditures? Direct Expenditures? No Expenditures?" 36 Southwestern Law Journal 597-644 (1982).
- "Sale-Leaseback Transactions Involving Real Estate: A Proposal for Defined Tax Rules," (co-authored with Phillip J. Harmelink) 55 Southern California Law Review 833-894 (1982).
- "Decision Model for Lease Parties in Sale-Leasebacks of Real Estate," 23 William and Mary Law Review 385-438 (1982).
- "Marital Status Discrimination: A Problem Not Solved by the Economic Recovery Tax Act of 1981," 59 Denver Law Journal 767-791 (1982).
- "The Windfall Profits Tax - Poor Tax Policy? Poor Energy Policy?" 34 University of Miami Law Review 1115-1158 (1980).
- "Nontaxable Exchange Treatment in the Sale-Leaseback of Real Estate," (co-authored with Phillip J. Harmelink) 8 Real Estate Law Journal 307-322 (1980).
- "Trust-Leasebacks After *Quinlivan*," (co-authored with Phillip J. Harmelink) 16 California Western Law Review 1-15 (1980).
- "The Visible Hand: Department of Energy Price Controls on Petroleum and Petroleum Products," (co-authored with Jake Dweck and David Galbraith) accepted for publication in American University Law Review, (1980).
- "Allocation of Partnership Income and Loss After the 1976 Act," 8 Tax Advisor 734-740 (1977).
- "Accumulation Trust Rules Under the Tax Reform Act," 116 Trusts and Estates 452-54, 488-489 (1977).
- "How to Control the Tax Consequences of Payments in Divorces and Legal Separation," (co-authored with Phillip J. Harmelink) 18 Taxation for Accountants 112-116 (1977).
- "The University in the Sunshine: Application of the Open Meeting Laws to the University Setting," 5 Journal of Law and Education 453-464 (1976).

“Jeopardy and Termination Assessments: The *Laing* Case and The Tax Reform Act of 1976,” (co-authored with Phillip J. Harmelink) 7 Tax Advisor 707-715 (1976).

“Deductions for Home Office: Current Proposals and Recommendations,” (co-authored with Phillip J. Harmelink) 54 Taxes 517-525 (1976).

“Child Care Expenses: Current Status & Alternatives,” (co-authored with Phillip J. Harmelink) 53 Taxes 479-484 (1975).

### ***Articles in Progress***

“Redesigning the American Lawn with Local Fiscal Incentives, National Credits, and a Grass Tax,” (co-authored with Esther Sherman).

“Ecofeminist Tax Policy and an Earth Friendly Future,” (co-authored with Krystal Noga-Styron).

“Dinghy in a Tidal Wave: Navigating Tax Policy in a Recession,” (co-authored with Krystal Noga-Styron).

“State and Local Fiscal Challenges in the Time of COVID: A Northwest Case Analysis.”

“Pandemic Reveals Flawed Taxation Design: Lessons from Past Disaster Policy.”

### ***Book Reviews***

#### **2021**

“Lawyer’s Guide to Elder Law—with Forms,” L. Rush Hunt, 48 Estate Planning (Jan. 2021); “Wise Moves: Checklist for Where to Live, What to Consider, and Whether to Stay or Go,” Sally Balch Hurme and Lawrence A. Frolik, 48 Estate Planning (Jan. 2021); “Understanding Life Insurance and Rethinking Policy Management and Evaluation: Explaining the Unexplainable,” Gary L. Flotron, 48 Estate Planning (Jan. 2021); “Undue Influence and Vulnerable Adults,” Sandra D. Glazier, Thomas M. Dixon and Thomas F. Sweeney, 48 Estate Planning (Jan. 2021).

#### **2020**

“Planning an Estate: A Guidebook of Principles and Techniques,” 4<sup>th</sup> Ed. Michael J. Feinfeld, 47 Estate Planning 28 (Oct. 2020); “A Lawyer’s Guide to Working with Special Needs Clients,” Richard A. Courtney, 47 Estate Planning 29 (Oct. 2020); “Estate Planning for the Muslim Client,” Yaser Ali and Ahmed Shaikh, 47 Estate Planning 29 (Oct, 2020); “The Executive Compensation Handbook: Stock Option Awards, Restricted Stock Grants, Cash Bonuses, Incentives, and Other Non-Qualified Deferred Compensation in Divorce,” Kristi Anderson Wells and Jon Eric Stuebner, 47 Estate Planning 31 (Oct. 2020); “Handling Federal Estate and Gift Taxes” (Revised 6<sup>th</sup>, 2019 Ed.). Myron Kove and James M. Kosakow, 47 Estate Planning 38 (Feb. 2020); “Planned

Giving Basics: The Why, the Who, and the How.” Carol Weisman, 47 Estate Planning 39 (Feb. 2020); “The Wealth Advisers Guide to Life Insurance: A Crash Course for Trustees, Attorneys, CPA’s and Family Offices,” Michael Brohawn, 47 Estate Planning 39 (Feb. 2020); “Essential Retirement Planning for Solo Agers: A Retirement and Aging Roadmap for Single and Childless Adults,” Sada Zeff Geber, 47 Estate Planning 39 (Feb. 2020).

## **2019**

”Asset Protection Strategies: Planning with Domestic and Offshore Entities, Volume I,” 2<sup>nd</sup> Ed., Alexander A. Bove, Jr., Ed., 46 Estate Planning 36 (Nov. 2019); “Becoming One of the Grateful Dead: Where There’s a Will, There’s a Way,” Carol Weisman, 46 Estate Planning 37 (Nov. 2019); “Personal Financial Planning for Executives and Entrepreneurs: The Path to Financial Peace of Mind,” Michael J. Nathanson, Jeffrey T. Craig, Jennifer A. Geoghegan, Nadine Gordon Lee, Michael A. Haber, Seth P. Hieken, Matthew C. Ilteris, D. Scott McDonald, Joseph S. Salvati and Stephen R. Stelljes, 46 Estate Planning 37 (Nov. 2019); “Handbook of Practical Planning for Artists, Art Collectors, and Their Advisors,” 2<sup>nd</sup> Ed. Ramsay H. Slugg, 46 Estate Planning 40 (June 2019); “Advising Clients on Elder and Disability Law,” 5<sup>th</sup> Ed., Laretta K. Murphy and Alison E. Hirshel, editors, 46 Estate Planning 40 (June 2019); “Financial Independence (Getting to Point X): A Comprehensive Tax-Smart Wealth Management Guide,” 2<sup>nd</sup> Ed., John J. Vento, 46 Estate Planning 41 (June 2019); “Purpose and a Paycheck: Finding Meaning, Money, and Happiness in the Second Half of Life,” Chris Farrell, 46 Estate Planning 42 (June 2019); “Due Diligence of Trust-Owned Life Insurance,” Lawrence Brody, Billie D. Resnick, John Resnick and Richard Weber, 46 Estate Planning 37 (Feb. 2019); “2018 Social Security and Medicare Facts,” Michael D. Thomas, Marc Kiner and Jim Blair, 46 Estate Planning 38 (Feb. 2019); “Look, I Shrunk Grandma,” Karen Severson, 46 Estate Planning 38 (Jan. 2019); Modern Real Estate Investing: The Delaware Statutory Trust, John Harvey and David Kangas, 46 Estate Planning 39 (Jan. 2019).

## **2018**

“2018 Field Guide: Estate & Retirement Planning, Business Planning & Employee Benefits,” Randy L. Lipse and Donald F. Cody, 45 Estate Planning 32 (Nov. 2018); “The Life Insurance Policy Crisis: The Advisors’ and Trustees’ Guide to Managing Risks and Avoiding a Client Crisis,” E. Randolph Whitelaw and Henry Montag, 45 Estate Planning 33 (Nov. 2018); “The Bucket Plan: Protecting and Growing Your Assets for a Worry-Free Retirement,” Jason L. Smith, 45 Estate Planning 33 (Nov. 2018); “The German Inheritance and Gift Tax,” Stefan Koniger 34 (Nov. 2018); “Elder Law and Later-Life Legal Planning,” Lawrence A. Frolik, 45 Estate Planning 30 (June 2018); “Putting Wealth to Work: Philanthropy for Today or Investing for Tomorrow?” Joel L. Fleishman, 45 Estate Planning 30 (June 2018); “Taxation and Funding of Nonqualified Deferred Compensation: A Complete Guide to Design and Implementation,” 3<sup>rd</sup> Ed., Marla J. Asinwell and Michael G. Goldstein, 45 Estate Planning 31 (June 2018); “Medicare for Dummies,” Patricia Barry, 45 Estate Planning 31 (June 2018); “The Advisor’s Guide to Disability Insurance,” David Watros, Tami Barraclough, and Erik Reynolds, 45 Estate Planning 38 (Feb. 2018); “Guide to US/UK Private Wealth Tax Planning, 2<sup>nd</sup> Ed.,”

Withers LLP and Robert L. Williams, 45 Estate Planning 38 (Feb. 2018); “Leveraging Life Insurance Premium Payments: Using Split-Dollar and Related Party Premium Financing Techniques,” Lawrence Brody and Donald O. Jansen, 45 Estate Planning 40 (Feb. 2018).

## **2017**

“The Cross-Border Family Wealth Guide: Advice on Taxes, Investing, Real Estate and Retirement for Global Families in the U.S. and Abroad,” Andrew Fisher, 44 Estate Planning 36 (Oct. 2017); “The Fundamentals of Guardianship: What Every Guardian Should Know,” National Guardianship Association, 44 Estate Planning 37 (Oct. 2017); “The Truth About Your Future: The Money Guide You Need Now, Later, and Much Later,” Ric Edelman, 44 Estate Planning 37 (Oct. 2017); “Get the Most Out of Your Retirement: Checklist For Happiness, Health, Purpose and Financial Security,” Sally Balch Burke, 44 Estate Planning 38 (Oct. 2017); “Mediation for Estate Planners: Managing Family Conflict,” Susan N. Gary, 44 Estate Planning 38 (June 2017); “Caregiver Stress: Neurobiology to the Rescue,” Heidi Crockett, 44 Estate Planning 38 (June 2017); “Stolen Legacy: Nazi Theft and the Quest for Justice at Krausenstrasse 17/18, Berlin,” Dina Gold, 44 Estate Planning 39 (June 2017); “Tax Planning for Family Wealth Transfers at Death: Analysis With Forms,” Howard M. Zaritsky, 44 Estate Planning 36 (Feb. 2017); “Wealth and Families: Lessons From My Life Journey,” Howard Stevenson with Shirley Spence, 44 Estate Planning 36 (Feb. 2017); “Working With Aging Clients: A Guide for Legal, Business and Financial Professionals,” Carolyn L. Rosenblatt, 44 Estate Planning 37 (Feb. 2017); “Personal Finance for Professionals,” Susan A. Berson, 44 Estate Planning 38 (Feb. 2017).

## **2016**

“Stocker on Drawing Wills and Trusts,” 14<sup>th</sup> Ed., Robert W. Sheehan and Michael S. Schwartz. 43 Estate Planning 40 (Oct. 2016); “Intentionally Defective Grantor Trusts Line by Line,” Brad A. Galbraith, Joseph O. Hankins and David A. Ruben, 43 Estate Planning 40 (Oct. 2016); “A Lawyer’s Guide to Financial Planning,” Cynthia Sharp, 43 Estate Planning 41 (Oct. 2016); “Farm Estate and Business Planning,” 19<sup>th</sup> Ed., Neil E. Hari, 43 Estate Planning 42 (Oct. 2016); “Being Mortal: Medicine and What Matters in the End,” Atul Gawande, 43 Estate Planning 30 (June 2016); “I Now Pronounce You Financially Fit: How to Protect Your Money in Marriage and Divorce,” Pam Friedman, 43 Estate Planning 31 (June 2016); “Principles of Estate Planning,” 2<sup>nd</sup> Ed., Carolynn Tomin and Colleen Carcone, 43 Estate Planning 31 (June 2016); “Estate Planning for Same-Sex Couples,” 3<sup>rd</sup> Ed., Joan M. Burda, 43 Estate Planning 32 (June 2016); “Navigating Life’s Transitions: Connecting Your Means to Your Meaning,” Joshua Kadish and Nicole Mayer, 43 Estate Planning 38 (Feb. 2016); “Inherited IRAs: What Every Practitioner Must Know, 2015 Ed.,” Seymour Goldberg, 43 Estate Planning 38 (Feb. 2016); “College Poor No More! 100 Savings Tips For College Students,” Michelle Perry Higgins, 43 Estate Planning, 39 (Feb. 2016); “Retirement Decisions Guide,” 2015 Ed., Slott, 43 Estate Planning 39 (Feb. 2016).

## **2015**



“Get What’s Yours: The Secrets to Maxing Out Your Social Security,” Laurence J. Kotlikoff, Philip Moeller, and Paul Solman, 42 Estate Planning 37 (Sept. 2015); “Asset Protection Planning,” James M. Lestikow and Robert Alan Romanoff, 42 Estate Planning 37 (Sept. 2015); “A Legacy Undone—An Extraordinary True Life Experience That Will Make You Rethink Protecting Your Family,” Terrie Hull and John Hull, 42 Estate Planning 38 (Sept. 2015); “Life and Death Planning for Retirement Benefits,” Natalie B. Choate, 42 Estate Planning 39 (Sept. 2015); “Estate Planning at the Movies: Art of the Estate Tax Return,” 2<sup>nd</sup> Ed., Keith Schiller, 42 Estate Planning 33 (May 2015); “Handbook of Practical Planning for Art Collectors and Their Advisors,” Ramsay H. Slugg, 42 Estate Planning 34 (May 2015); “J.K. Lasser’s New Rules for Estate, Retirement and Tax Planning,” 5<sup>th</sup> Ed., Stewart H. Welch III, Harold I. Apolinsky and J. Winston Busby, 42 Estate Planning 34 (May 2015); “Women, Money & Prosperity: A Sister’s Perspective on How to Retire Well,” Donna M. Phelan, 42 Estate Planning 35 (May 2015); “Family Business and Positive Psychology: New Planning Strategies for the 21st Century,” Scott E. Friedman, 42 Estate Planning 37 (Feb. 2015); “Best Practices for Structuring Trusts and Estates,” 2014 Ed., Aspatore Books, 42 Estate Planning 37 (Feb. 2015); “Trust Protectors—A Practice Manual with Forms,” Alexander A. Bove, Jr., 42 Estate Planning 39 (Feb. 2015).

## **2014**

“The Truth About Retirement Plans and IRAs,” Ric Edelman, 41 Estate Planning 35 (September 2014); “Whether to Wed: A Legal and Tax Guide for Gay and Lesbian Couples,” Scott E. Squillace, 41 Estate Planning 35 (September 2014); “A Practitioner’s Guide to Innocent Spouse Relief: Proven Strategies for Winning Section 6015 Tax Cases” (2<sup>nd</sup> Ed.), Robert B. Nadler, 41 Estate Planning 36 (September 2014); “The Advisor’s Guide to 401(k) Plans,” 2014 Ed., Bruce Tanahill and Louis R. Richev, 41 Estate Planning 37 (September 2014); “Asset Protection Planning Guide, 3<sup>rd</sup> Ed.” Barry S. Engel, 41 Estate Planning 37 (September 2014); “A Guide to International Estate Planning: Drafting, Compliance, and Administrative Strategies,” 2<sup>nd</sup> Ed. Leigh-Alexandra Basha, Editor, 41 Estate Planning 41 (May 2014); “The Tools & Techniques of Estate Planning for Modern Families,” L. Paul Hood, Jr. and Stephan R. Leimberg, 41 Estate Planning 38 (May 2014); “The Advisor’s Guide to Nonqualified Deferred Compensation,” 2014 Ed., Louis R. Richey, Richard C. Baier, and John Phelan, 41 Estate Planning 38 (May 2014).

## **2013**

“Ethics in the Practice of Elder Law,” Roberta K. Flowers and Rebecca C. Morgan, 40 Estate Planning 36 (Dec. 2013); “Planning an Estate: A Guidebook of Principles and Techniques,” 4<sup>th</sup> Ed., Harold Weinstock and Martin Neumann, 40 Estate Planning 37 (Dec. 2013); “Estate and Financial Planning for People Living With COPD,” Martin M. Shenkman, 40 Estate Planning 37 (Dec. 2013); “Financial Independence (Getting to Point X): An Advisor’s Guide to Comprehensive Wealth Management,” John J. Vento, 40 Estate Planning 37 (Dec. 2013); “Taxation and Funding of Non-Qualified Deferred Compensation: A Complete Guide to Design and Implementation,” 2<sup>nd</sup> Ed., Michael Goldstein and Maria Aspimwall, 40 Estate Planning 40 (Aug. 2013); “The Advisor’s Guide to Annuities,” 3<sup>rd</sup> Ed., John Olsen and Michael E. Kitces, 40 Estate Planning 40

(Aug. 2013); "Understanding Business Valuation: A Practical Guide in Valuing Small to Medium Sized Businesses," 4<sup>th</sup> Ed., Gary S. Trugman, 40 Estate Planning 41 (Aug. 2013); "Asset Protection Secrets: How America's Affluent Lawsuit Proof Their Wealth...And How You Can Too," Hillel L. Presser, 40 Estate Planning 42 (Aug. 2013); "2012 Social Security & Medicare Facts," Joseph F. Strenken, 40 Estate Planning 36 (May 2013); "Counseling Unmarried Couples: A Guide to Effective Legal Representation," Frederick Hertz, 40 Estate Planning 36 (May 2013); "The New Three-Legged Stool: A Tax Efficient Approach to Retirement Planning," Rick Rodgers, 40 Estate Planning 37 (May 2013); "2012 Multistate Guide to Estate Planning," Jeffrey A. Schoenblum, 40 Estate Planning 38 (May 2013).

## **2012**

"A Canadian's Best Tax Haven: The U.S.," Robert Keats, 39 Estate Planning 38 (Nov. 2012); "Retirement Benefits Issues in Estate Planning," Steven R. Lifson, 39 Estate Planning 38 (Nov. 2012); "Estate Planning for Same-Sex Couples," Joan M Burdi, 39 Estate Planning 39 (Nov. 2012); "Quick Reference to IRAs," Gary S. Lesser and Deise Appleby, 39 Estate Planning 39 (Nov. 2012); "Probate Wars of the Rich and Famous: An Insider's Guide to Estate Planning and Probate," Russel J. Fishkind, 39 Estate Planning 40 (July 2012); "The Advisor's Guide to Life Insurance," Harold D. Skipper and Wayne Toning, 39 Estate Planning 40 (July 2012); "Protect and Enhance Your Estate: Definitive Strategies for Estate and Wealth Planning," Robert A. Espert, Renno L. Perterson and David K. Cahoone, 39 Estate Planning 41 (July 2012); "The ABA Practical Guide to Estate Planning," Jay A. Soled, 39 Estate Planning 41 (July 2012); "The ABA Checklist for Family Heirs: A Guide to Family History, Financial Plans and Final Wishes," Sally Balch Hurme, 39 Estate Planning 36 (March 2012); "Conservation Easements: Tax and Real Estate Planning for Landowners and Advisors," David J. Dietrich and Christian Dietrich, 39 Estate Planning 37 (March 2012); "Advising the Small Business: Forms and Advice for the Legal Practitioner, 2nd Ed." Jean L. Batman, 39 Estate Planning 37 (March 2012); "The Tools & Techniques of Estate Planning," Stephan R. Leimberg, et al., 39 Estate Planning 36 (March 2012)

## **2011**

"A Reviewer's Handbook to Business Valuation: Practical Guidance to the Use and Abuse of a Business Appraisal," L. Paul Hood, Jr. and Timothy R. Lee, 38 Estate Planning 40 (Nov. 2011); "Practical Estate Planning in 2011 and 2012," Howard M. Zaritsky, 38 Estate Planning 40 (Nov. 2011); "Assisted Reproductive Technology: A Lawyer's Guide to Emerging Law and Science," 2<sup>nd</sup> Ed., Charles P. Kindregan, Jr. and Maureen McBrien, 38 Estate Planning 41 (Nov. 2011); "Drafting Limited Liability Company Operating Agreements," 2<sup>nd</sup> Ed., John M. Cunningham, 38 Estate Planning 41 (Nov. 2011); "Divorce in the Golden Years: Estate Planning, Spousal Support, and Retirement Issues for Clients at Midlife and Beyond," Leslie Ann Shaner, 38 Estate Planning 41 (Aug. 2011); "The Roth Revolution: Pay Taxes Once and Never Again," James Lange, 38 Estate Planning 42 (Aug. 2011); "2011 Tax Facts on Investments," Steven A. Meyerowitz, 38 Estate Planning 42 (Aug. 2011); "Fundamentals of Special Needs Trusts," Stuart D. Zimring, Rebecca C. Morgan and Bradley J. Frigon, 38 Estate Planning 43 (Aug. 2011); "An Estate Planner's Guide to Family Business Entities:

Family Limited Partnerships, Limited Liability Companies, and More,” (3<sup>rd</sup> Ed.), Louis A. Mezzullo, 38 Estate Planning 41 (Feb. 2011); “Estate Planning for Special Assets,” Continuing Education of the Bar of California, 38 Estate Planning 41 (Feb. 2011); “Buy-Sell Agreements for Closely Held and Family Business Owners,” Z. Christopher Mercer, 38 Estate Planning 42 (Feb. 2011).

## **2010**

“The 101 Biggest Estate Planning Mistakes,” Herbert E. Nass, 37 Estate Planning 41 (June 2010); “A Practical Guide to Estate Planning for a Family With a Special Needs Child,” Sebastian V. Grassi, Jr., 37 Estate Planning 41 (June 2010); “Redefining Retirement for a New Generation: Saving Your Retirement in a Turbulent World,” Robert J. Krakower, 37 Estate Planning 42 (June 2010); “Gay, Lesbian, and Transgender Clients: A Lawyer’s Guide,” Joan B. Burda, 37 Estate Planning 42 (June 2010); “Family Wealth Transition Planning: Advising Families with Small Businesses,” Bonnie Brown Hartley and Gwendolyn Griffith, 37 Estate Planning 42 (Feb. 2010); “The Law of Trustee Investments,” Christopher P. Cline, 37 Estate Planning 42 (Feb. 2010); “The New Form 990: Law, Policy, and Preparation,” Bruce R. Hopkins, Douglas K. Anning, Virginia C. Gross, and Thomas J. Schenkelberg, 37 Estate Planning 43 (Feb. 2010); “Super Trader: Make Consistent Profits in Good and Bad Markets,” Van K. Tharp, 37 Estate Planning 44 (Feb. 2010).

## **2009**

“Planning and Defending Asset-Protection Trusts,” Even H. Farr, Richard W. Nenno, Gideon Rothschild, John A. Terrill II and John E. Sullivan III, 36 Estate Planning 43 (Aug. 2009); “Philanthropy in a Flat World: Inspiration Through Globalization,” Jon Duschinsky, 36 Estate Planning 43 (Aug. 2009); “BVR’s Guide to Business Valuation: Issues in Estate and Gift Tax,” Paul Heidt (editor.), 36 Estate Planning 44 (Aug. 2009); “An Estate Planner’s Guide to Life Insurance,” Louis A. Mezzullo, 36 Estate Planning 44 (Aug. 2009); “Retire Secure! Pay Taxes Later: The Key to Making Your Money Last,” 2<sup>nd</sup> Ed., James Lange, 36 Estate Planning 42 (June 2009); “Inheritance Hijackers: Who Wants to Steal Your Inheritance and How to Protect It,” Robert C. Adamski, 36 Estate Planning 43 (June 2009); “Business Valuation: A Primer for the Legal Professional,” Jeffrey M. Risius, 36 Estate Planning 43 (June 2009); “The Lawyer’s Field Guide to Effective Business Development,” William J. Flannery, Jr., 36 Estate Planning 42 (June 2009); “Private Foundations: Tax Law and Compliance,” Bruce R. Hopkins and Jody Blazek, 36 Estate Planning 35 (Feb. 2009); “The Only Guide to Alternative Investments You’ll Ever Need: The Good, the Flawed, the Bad, and the Ugly,” Larry E. Swedroe and Jared Kizer, 36 Estate Planning 35 (Feb. 2009); “A Practical Guide to Drafting Irrevocable Life Insurance Trusts (With Sample Forms and Checklists),” Sebastian V. Grassi, Jr., 36 Estate Planning 36 (Feb. 2009); “The Alzheimer’s Advisor: A Caregiver’s Guide to Dealing With the Tough Legal and Practical Issues,” Vaughn E. James, 36 Estate Planning 36 (Feb. 2009).

## **2008**

"Residence Options for Older and Disabled Clients," Lawrence A. Frolik, 35 Estate Planning 42 (Aug. 2008); "How to Build and Manage an Estates Practice," Daniel B. Evans, 35 Estate Planning 43 (Aug. 2008); "Tools & Techniques of Income Retirement Planning," Stephan R. Leimberg, et al., 35 Estate Planning 43 (Aug. 2008); "Tax and Estate Planning with Real Estate, Partnerships and LLCs," Jerome Ostrov, 35 Estate Planning 44 (Aug. 2008); "Executive's Guide to Fair Value: Profiting from the New Valuation Rules," Alfred M. King, 35 Estate Planning 43 (June 2008); "Get Rich, Stay Rich, Pass It On: The Wealth-Accumulation Secrets of America's Richest Families," Catherine S. McBreen and George H. Walper, Jr., 35 Estate Planning 43 (June 2008); "The Insured Stock Purchase Agreement: With Sample Forms," 2<sup>nd</sup> Ed., Lawrence Brody and Stephen B. Daiker, 35 Estate Planning 42 (June 2008); "Nonprofit Strategic Planning: Leveraging Sarbanes-Oxley Best Practices," Peggy M. Jackson, 35 Estate Planning 42 (June 2008); "An Estate Planner's Guide to Qualified Retirement Plan Benefits," Louis A. Mezzullo, 35 Estate Planning 40 (Feb. 2008); "Family: The Compact Among Generations," James E. Hughes, Jr., 35 Estate Planning 40 (Feb. 2008); "The Family Limited Partnership Deskbook, Forming and Funding FLPs and Other Closely Held Business Entities," David T. Lewis and Andrea C. Chomakos, 35 Estate Planning 41 (Feb. 2008); "Yours, Mine & Ours: Creating a Compelling Donor Experience," Barry McLeish, 35 Estate Planning 41 (Feb. 2008).

## **2007**

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"Significant Probate and Trust Literature," 28 Real Property Probate and Trust Journal 321-382 (Summer 1993).  
"Significant Probate and Trust Literature," 26 Real Property, Probate and Trust Journal 615-653 (Fall 1991).  
"Significant Probate and Trust Literature," 25 Real Property, Probate and Trust Journal 561-589 (Fall 1990).  
"Annual Review of Literature," 24 Real Property, Probate and Trust Journal 203-216 (Summer 1989).

### ***Miscellaneous Publications (including op-eds)***

- "We are the Front-Line Defense," The Register Guard, April 5, 2020, available at <https://www.registerguard.com/opinion/20200405/guest-view-we-are-front-line-defense>.
- "Good Citizens Are Also Good Neighbors," The Bend Bulletin, April 2, 2020, available at [https://www.bendbulletin.com/opinion/guest-column-good-citizens-are-also-good-neighbors/article\\_f7909f54-7464-11ea-9279-bfa7a920f88a.html](https://www.bendbulletin.com/opinion/guest-column-good-citizens-are-also-good-neighbors/article_f7909f54-7464-11ea-9279-bfa7a920f88a.html).
- "Setting the Record Straight on 'Investigative Report'," The Register Guard, April 25, 2018.
- "Halloween Trick on Students and Free Expression," Sunday Oregonian, Oct. 29, 2017.
- "An Ode to Wendy," poem in "Tribute to Wendy Gerzog," 150 Tax Notes 467, 470 (January 25, 2016).
- "Reform the Tax System: End Preferred Rates for Capital Gains," op-ed (co-authored with Rodney Mock) San Francisco Chronicle, April 13, 2015.
- "Education Planning: Taxes, Trusts, and Techniques," ABA Brochure (2015).
- "Turbo Tax Crime Waves," op-ed (co-authored with Rodney Mock) Wall Street Journal, April 16, 2012.
- "The Turbo Tax Defense," op-ed (co-authored with Rodney Mock) San Francisco Chronicle, March 27, 2012.
- "529's in Turbulent Times," 26 Estate Planning and Administration Section Newsletter 1-3 (July 2009).
- "Want Higher Ed? Better Plan Ahead," Estate Planning and Administration Section Newsletter 1-4 (2006).
- "The Advantages and Problems With Using Tax Basis Revocable Trusts," Oregon Estate Planning and Administration Section Newsletter 5-6 (1996).
- "Measure 47: Alluring, Problematic," The Register-Guard (Commentary Section) (December 1, 1996).
- "Estate Tax Aspects of Employee Death Benefits Under Qualified Plans," Eugene Estate Planning Council Seminar Proceedings 229-252 (Fall 1983).
- "Passing It On--Planning For the Future--Alive or Otherwise," Washington State Bar Association Federal Tax Conference Proceedings, Chapter 11, pp. 11-1 to 11-88 (Summer 1983).
- "Using Tax Incentives to Help Solve the Energy Crisis," Selected Papers of the American Business Law Association (Fall 1981).

“Reagan's New Tax Policies: Will They Be Effective and Fair?” 1 Selected Papers of the American Business Law Association District One Proceedings 168-183 (Spring 1981).

“Estate and Gift Tax Changes Under the Tax Reform Act of 1976,” (co-authored with Phillip J. Harmelink) National Public Accountant 16-23 (April 1978).

“Tax Effects in Divorce Planning,” (co-authored 27-32 with Phillip J. Harmelink) 57 The CPA Journal (October 1977).

“Ernst & Ernst v. Hochfelder: Analysis and Implications,” (co-authored with Phillip J. Harmelink) 35 Ohio CPA Journal 101-107 (Fall 1976) revised for Accountants Digest 129-133 (March 1977).

“Special Tax Problems of Professors,” Southeastern Regional Business Law Proceedings 1-7 (Fall 1976).

“Consulting Editor's Comment,” Survey of Business, Vol. 11, No. 4, p. 3 (March/April 1976).

“Equality in the Job Market,” Tennessee Survey of Business, Vol. 10, No. 1, p. 17 (September/October 1974).

### **CLE PROGRAMMING**

“The Marijuana Business in Oregon: Environmental, Tax, and Regulatory Concerns,” 34<sup>th</sup> Annual Public Interest Environmental Law Conference, Eugene Oregon, March 5, 2016.

“What's Hot in Oregon? Recent Developments in Estate Planning,” 45<sup>th</sup> Annual Estate Planning Seminar, at Oregon Convention Center, Portland Oregon, Feb. 5, 2016.

“State and Local Carbon Tax Initiatives in Western North America: Blueprint for Global Climate Change Policy,” 2015 San Diego Climate and Energy Law Symposium, San Diego, California, Nov. 6, 2015.

“Equal Pay Act and Tax Equity Issues for Women and Minorities,” keynote speech at the New Mexico Women's Bar Association Convention on Equal Rights in New Mexico: Balanced Theory, Thorny Reality, Albuquerque, NM, December 1, 2000.

“Tax Basis Revocable Trusts,” speech at the Oregon State Bar Continuing Legal Education program on advanced estate-planning issues, Salem, Oregon, June 27, 1997.

“Retirement Planning: Areas of Client Concern,” panel at the 1994 American Bar Association Annual Meeting, New Orleans, Louisiana, August 1994.

“Estate Planning for Cohabiting Couples,” speech at International Financial Planners Association meeting, Eugene, Oregon, Spring 1994.

“International Estate Planning: The Canadian and Caribbean Connection,” panel at the American Bar Association Annual Meeting, New York, New York, August 1993.

“Financial Planning and the Role of the Estate Planning Attorney,” panel at the American Bar Association Annual Meeting, New York, New York, August 1993.

“Taxation of Settlements and Damages,” speech at the Oregon State Bar Continuing Legal Education: Advanced Seminar Series, Portland, Oregon, May 12, 1993.

“The Closely Held Business: Planning Challenges of the '90s,” panel at the 1992 American Bar Association Annual Meeting, San Francisco, California, August, 1992.

“Estate Planning for Non-U.S. Citizens: What Every Estate Planner Should Know About International Estate Planning,” panel at the 1992 American Bar Association Annual Meeting, San Francisco, California, August, 1992.

### **MISCELLANEOUS SPEAKING ENGAGEMENTS**

“Energy and Housing Markets,” panel discussant at the National Tax Association Conference, Nov. 18<sup>th</sup> 2020 (by zoom).

Dinghy in a Tidal Wave: Navigating Tax Policy in a Recession,” paper delivered at Oregon Law School’s Lectures and Awards series, Eugene, Oregon, October 3, 2016.

“Education Planning: Taxes, Trusts, & Techniques,” Susan Gary’s Estate Planning Class, Eugene Oregon, March 3, 2016.

Chores, Work and Wealth: Feminist Theory and the Tax Code,” speech delivered to South Eugene High School students, Eugene Oregon, Feb. 15, 2015.

“When It Pays to Be Gay,” speech delivered at Stetson University College of Law, Gulfport, Florida, April 15, 2010.

“Tax Planning With Real Estate,” speech delivered to faculty at University of Oregon School of Law, January 8, 2010.

“Queer Taxes (or When It Pays to Be Gay),” speech presented for Lectures & Awards Series, University of Oregon School of Law, Eugene, Oregon, May 3, 2007

“Queer Taxes,” speech presented for class on Gay & Lesbian Legal Issues, University of Oregon School of Law, Eugene, Oregon, April 4, 2007.



“Suggestions for Book Series and Independent Books” (27-page paper) presented to the Books and Media Committee of the American Bar Association (Real Property, Probate & Trust Section), Tampa, Florida, November 8, 2004.

“Law Through a Cultural Lens,” speech to International Humphries Scholars, Eugene, Oregon, July 15, 2003.

“Are You Interested in Law School?” speech for University of Oregon’s Pre-Law Society, Eugene, Oregon, May 24, 2001.

“The Workplace,” a poem delivered at Biology and the Law Conference, Squaw Valley, California, June 1996.

### **SPEECHES (or Papers Delivered) ON BUSINESS AND TAX**

“State and Local Fiscal Challenges in the Time of COVID: A Northwest Case Analysis,” paper presented at the National Tax Association Conference, Nov. 18<sup>th</sup> 2020 (by zoom).

“Pandemic Reveals Flawed Taxation Design: Lessons from Past Disaster Policy,” paper presented at the Global Conference on Environmental Taxation, September 24, 2020 (by zoom).

“Addressing Geographic Economic Inequality: Can Tax Policy Narrow the Urban/Rural Divide,” was to be delivered in August 2020 in Denver at the Rural Sociological but conference was canceled due to COVID-19.

“Tax as a Tool for Self-Determination: The Northwest Native American Case Study,” Indigenous Knowledge Forum, University of Technology, Sydney, Australia, June 13, 2019.

“The Urban/Rural Divide: Can Tax Policy Be Used to Bridge the Gap?” paper delivered at Law and Society Conference, Washington D.C., May 31, 2019.

“Tax as a Tool for Self-Determination,” Critical Tax Conference, Malibu, California, April 5, 2019.

“Rural America Rejuvenated with New Tax Approaches,” paper delivered at the 111<sup>th</sup> Annual National Tax Association Conference, New Orleans, Nov. 16, 2018.

“Rural Oregon Rejuvenated with New Tax Approaches,” speech at the Rural Sociological Conference, Portland, Oregon, July 27, 2018.

“Hurricanes and the Uninsured: Another Blow to the Middle Class,” paper delivered Law and Society Conference, Toronto, Canada, June 8, 2018.

- “Horizontal Inequity Under the Tax Cuts and Jobs Act of 2017,” paper delivered at the Critical Tax Conference, Columbia, South Carolina, April 14, 2018.
- “Assessing the New Tax Law: Benevolent or Malevolent?,” speech at the Savannah Law School, Savannah, Georgia, April 11, 2018.
- “A Day in the Life of a Tax Practitioner,” paper delivered to the New Tax Lawyer Committee of the Tax Section of the Oregon State Bar, Eugene, Oregon, September 28, 2016.
- “Rethinking the Tax Unit: Why Dependency Should Replace Marriage,” paper delivered at Critical Tax Conference, New Orleans, Louisiana, April 2, 2016.
- “Long-Term Care and the Tax Code: A Feminist Perspective,” paper delivered at Seattle University School of Law, Seattle, Washington, Nov. 29, 2015
- “Tax-Exempt Status of Hospitals: Assessing Accountability after the Affordable Care Act,” paper delivered at Critical Tax Conference in Chicago, Illinois, April 3, 2015.
- “Long-Term Care and the Tax Code: A Feminist Perspective,” paper delivered at Tax Policy Colloquium, Loyola Law School, Los Angeles, California, September 15, 2014.
- “Inequity and Higher Education: Unintended Consequence of U.S. Tax Loan Policy,” paper delivered at Law and Society Conference, Minneapolis, Minnesota, May 30, 2014.
- “State Tax Policy and the Great Recession,” paper delivered at Oregon Law School’s Lecture and Awards Series, Eugene, Oregon, April 18, 2014.
- “Inequity and Higher Education: Unintended Consequence of U.S. Tax Loan Policy,” paper delivered at Law and Society Conference, Minneapolis, Minnesota, May 30, 2014.
- “Relationship LLCs: Can Partnership Taxation Solve Same-Sex Discrimination?” paper delivered at Critical Tax Conference, Newark, New Jersey, March 30, 2012.
- “The Good, the Bad, and the Inconsistent: An Analysis of Education Tax Policy,” ABA Tax Section, May 7, 2010, Washington, D.C.
- “Rethinking Education Tax Policy,” paper delivered at the Critical Tax Conference, UCLA Law School, Los Angeles, California, April 14, 2007.
- “Queer Theory and the Quest for the (in)Essential Taxpayer” paper delivered at the Critical Tax Conference, Seattle University, Seattle, Washington, April 2, 2005.
- “Corporate Welfare: Who Benefits?” speech at Chiles Center, University of Oregon, Eugene, Oregon, May 4, 2004.

“Public Forum on Tax Reform,” panel discussion, University of Oregon College Democrats, at University of Oregon, Eugene, Oregon, April 14, 2004.

“The Seven Deadly Sins of Taxation Policy,” speech at the University of Washington LL.M. Taxation Program, Seattle, Washington, November 25th, 2003.

Moderator on Panel: “Legal and Tax Reforms to Facilitate Economic Growth, at “Restoring Oregon’s Economy: Business Innovation and Law” Conference, Portland, Oregon, September 5, 2003.

“Mediation and Taxation,” speech to visiting Ukrainians during Summer Mediation Tour, Eugene, Oregon, August 20, 2002.

“Welfare, Economic Justice, and the Tax System: Restoring the Social Compact,” paper delivered at Conference on Work, Welfare and Politics, Center for the Study of Women in Society, Eugene, Oregon, February 2002.

“Keeping Some of What You Earn: The Basics of State and Federal Taxation,” speech for Lecture Series for Small Businesses, Portland, Oregon, November 27, 2000; Eugene, Oregon, April 4, 2001; and Eugene, Oregon, October 3, 2001.

“Using the Tax System to Support Your Family,” speech at the Women’s Law Forum, Eugene, Oregon, January 20, 1999.

“Discrimination Against Cohabiting Couples Under the Tax Code,” speech at the first annual Lewis & Clark Forum, Portland, Oregon, October 6, 1995. (Other participants included Ann Alstott, Marjorie Kornhauser, Ed McCaffery, and Laurence Zelenak. Proceedings were chronicled in the October 23rd edition of TAX NOTES.)

“The Closely Held Business: Planning Challenges of the '90s;” program presented at the 1992 American Bar Association Annual Meeting, San Francisco, California, August, 1992.

“Income Taxation For Performing, Visual and Literary Artists,” speech to Washington Lawyers For the Arts, Seattle, Washington, October 7, 1992.

### **SPEECHES (or Papers Delivered) ON ENVIRONMENTAL LAW**

“Funding the Green New Deal for a More Equitable and Sustainable Future,” League of Women Voter’s Public Forum, Albany Public Library, May 28<sup>th</sup>, 2019.

“Self-Motivated Eco-Centrism: The Modern Institutional Carbon Tax,” 2019 Sustainability Conference of American Legal Educators, Arizona State University, Phoenix, Arizona, May 10<sup>th</sup>, 2019.

- “2019 Funding the Green New Deal,” Public Forum on Ecosocialism and the Green New Deal, Corvallis-Benton County Public Library, March 18<sup>th</sup>, 2019.
- “Redesigning the American Lawn with Local Fiscal Incentives and a National Grass Tax,” 18<sup>th</sup> Global Conference on Environmental Taxation, Tucson, Arizona, September 27, 2017.
- “Workshop on Business Law: Discussion Group: Environmental Protection and the Green Economy,” Southeastern Association of Law Schools Conference, Boca Raton, Florida, Aug. 3, 2017.
- “Self-Motivated Eco-Centrism: The Modern Institutional Carbon Tax,” Law & Society Conference, Mexico City, Mexico, June 22, 2017.
- “The Marijuana Business in Oregon: Environmental, Tax, and Regulatory Concerns,” 34<sup>th</sup> Annual Public Interest Environmental Law Conference, Eugene Oregon, March 5, 2016.
- “Carbon Pricing Initiatives in Western North America: Blueprint for Global Climate Change Policy,” paper delivered at the 2015 San Diego Climate and Energy Law Symposium, San Diego, California, Nov. 6, 2015.
- “Controlling Global Heat with Cool New Local Tax Initiatives,” paper delivered at the Law and Society Conference, Seattle, Washington, May 29, 2015.
- “Keeping Your Bottom-Line Green Friendly: Growing Business Wealth to Promote Environmental Health,” panel at Public Interest Environmental Law Conference Panel, Eugene, Oregon, March 7, 2015.
- “Combating Climate Change: Will a Carbon Tax Fly in Oregon?” power point for League of Women Voters, Corvallis, Oregon, November 20, 2014.
- “Repurposing Historic Buildings and Urban Renewal,” panel at the Constructing the Green Future Symposium sponsored by the Law School’s Green Business Initiative, Eugene, Oregon, April 18, 2014.
- “U.S. Local Environmental Taxes: Laboratories for Innovative Climate Change Policy,” speech at 3<sup>rd</sup> Annual Climate Change Research Symposium Initiative, Eugene, Oregon, April 16, 2014.
- “Sustainable Cities: Green Building and Smart Growth Initiatives,” panel at Public Interest Environmental Law Conference Panel, Eugene, Oregon, March 3, 2013.
- “U.S. Local Environmental Taxes: Laboratories for Innovative Climate Change Policy,” paper delivered at 13<sup>th</sup> Global Conference on Environmental Taxation, Vancouver, British Columbia, September 21, 2012.

“Market Instruments and Green Building Practices: How the Great Recession is Shaping Environmental Policy in the Western United States,” 12<sup>th</sup> Global Conference on Environmental Taxation, Madrid, Spain, October 20, 2011.

“Seeing Green: Eco-Friendly Building From the Ground Up,” Summer for the City Lecture Series, Portland, Oregon, July 9, 2009.

“Green Building,” Fireside Chat Series, Many Nations Longhouse, Eugene, Oregon, April 9, 2009.

Panel: “Growing a Green Economy: Perspectives from Law and Business,” White Stag Block, Portland, Oregon, April 3, 2009.

Panel Moderator: “Sustainable Business” Symposium, Eugene, Oregon, April 11, 2008.

“The Role of Environmental Tax and Market Mechanisms in the Green Building Movement: The Case of Portland, Oregon,” paper delivered at International Environmental Tax Conference, Singapore, November 6, 2008.

“Carbon Taxes vs Cap and Trade,” speech delivered at the Critical Tax Conference, Florida State University, Tallahassee, Florida, April 4, 2008.

“Mother Earth Says, ‘I’m Cool With Carbon Taxes,’” Fireside Chat Series, Many Nations Longhouse, Eugene, Oregon, October 10, 2007.

“Gas Guzzlers & Electric Cars – How Taxes Affect Behavior,” Fireside Chat Series, Many Nations Longhouse, Eugene, Oregon, April 5, 2006.

“Eco-Taxation: The Two Kinds of Green,” speech at Public Interest Environmental Law Conference, Eugene, Oregon, March 2, 2001.

“Global Economic Development and International Tax Policy,” Ecofeminism panel at the Public Interest Environmental Law Conference, Eugene, Oregon, March 8, 1998.

“Pay Now, Pay Later: Corporate Welfare and the Social/Environmental Costs of Doing Business,” panel at the Public Interest Environmental Law Conference, Eugene, Oregon, March 16, 1997.

“An Examination of Environmental Taxation,” panel at Public Interest Environmental Law Conference, Eugene, Oregon, March 1996.

“Integrating Environmental Taxes: Alternatives for Comprehensive Policies,” panel at Public Interest Environmental Law Conference, Eugene, Oregon, March 1995.

“Rethinking Environmental Policy: Let the Tax System Command and Control,” speech at a JOURNAL OF ENVIRONMENTAL LAW & LITIGATION CLE program entitled “Environment & Business: Toward Sustainability or Ecological Collapse?” Eugene, Oregon, March 16, 1995.

## **SPEECHES ON ESTATE PLANNING**

“What’s Hot in Oregon? Recent Developments in Estate Planning,” 45<sup>th</sup> Annual Estate Planning Seminar, at Oregon Convention Center, Portland Oregon, Feb. 5, 2016.

“Coordinating Education Planning with Estate Planning, Retirement Planning and Financial Aid,” University of Oregon, Eugene, Oregon, March 5, 2014.

“Creating Wealth Through Rentals: Chapter in Upcoming ABA Book,” University of Oregon, Eugene, Oregon, December 18, 2009.

“Educational Planning,” speech presented in Estate Planning class of Ellen Adler, University of Oregon, Eugene, Oregon, March 1, 2007.

“Hot Topics in Charitable Giving,” presented at UO Office of Gift Planning Professional Advisory Council meeting, Eugene, Oregon, July 26, 2005.

“The Popular QTIP Marital Deduction: Sexism in Estate Planning?” panel discussion at the Association of American Law Schools, 2001 Annual Meeting, San Francisco, California, January 6, 2001.

“Tax Basis Revocable Trusts,” speech at the Oregon State Bar Continuing Legal Education program on advanced estate planning issues, Salem, Oregon, June 27, 1997.

“Retirement Planning: Areas of Client Concern,” speech at the 1994 American Bar Association Annual Meeting, New Orleans, Louisiana, August 1994.

“Estate Planning for Cohabiting Couples,” speech at International Financial Planners Association meeting, Eugene, Oregon, Spring 1994.

“International Estate Planning: The Canadian and Caribbean Connection,” speech at the 1993 American Bar Association Annual Meeting, New York, New York, August 1993.

“Financial Planning and the Role of the Estate Planning Attorney,” speech at the 1993 American Bar Association Annual Meeting, New York, New York, August 1993.

“Financial Planning and The Role of the Estate Planning Attorney” presentation at the 1993 American Bar Association Annual Meeting, New York, New York, August, 1993.

“Estate Planning for Non-U.S. Citizens: What Every Estate Planner Should Know About International Estate Planning;” program presentation at the 1992 American Bar Association Annual Meeting, San Francisco, California, August, 1992.

## **SPEECHES (and Papers Delivered) ON WOMEN AND THE LAW**

- “Ecofeminist Tax Policy for an Earth Friendly Future,” paper delivered at the Law & Society Conference, May 31, 2020 (by zoom).
- “Tax Base Bias and Gender Inequality,” paper delivered at the Critical Tax Conference, April 12, 2020 (by zoom).
- “Tax, Class, and Elder Women in Rural America: The Challenges of Long-Term Care,” Rural Sociological Society, Richmond, Virginia, August 10, 2019.
- “Tax, Class, Women, and Elder Care,” paper delivered American Association of Law Schools Conference, New Orleans, January 4, 2019.
- “Long-Term Care and the Tax Code: A Feminist Perspective on the Culture of Elder Care,” paper delivered at Tax Policy Colloquium, Loyola Law School, Los Angeles, California, September 15, 2014.
- “Long-Term Care and the Tax Code: A Feminist Perspective on the Culture of Elder Care,” speech to faculty at University of Oregon Law School’s Lecture and Awards Series, Eugene, Oregon, April 18, 2014.
- “Long-Term Care and the Tax Code: A Feminist Perspective,” paper delivered at Critical Tax Conference, Baltimore, Maryland, April 5, 2014.
- “Sweden, Singapore and the States: A Comparative Analysis of the Impact of Taxation on the Welfare of Working Mothers,” paper delivered at the Critical Tax Conference, St. Louis Law School, St. Louis, Missouri, April 9, 2010.
- “Singapore, Sweden and the States: A Comparative Analysis of the Impact of the Income Tax System on Women’s Welfare,” speech to University of Oregon Faculty, January 15, 2010.
- “Singapore, Sweden and the States: A Comparative Analysis of the Impact of the Income Tax System on Women’s Welfare,” paper delivered at Law & Society Meeting, Denver, Colorado, May 30, 2009.
- “The IRS Innocent Spouse Rule and the Abuse of Women,” presentation for CSLA Association, University of Oregon Law School, Eugene, Oregon, October 2, 2007.
- “Women Lawyers Achieving Success,” panel at Lane County Women’s Bar, Eugene, Oregon, May 19, 2005.
- “Assimilation & Resistance in Personal, Professional, and Pedagogical Practices: A Roundtable Discussion,” panel at conference, Assimilation & Resistance: Emerging Issues in Law & Sexuality, Seattle, Washington, September 20, 2002.

“Islam and Women and Immigration Issues,” panel presentation at Seventh Annual LatCrit Conference, Portland, Oregon, May 3, 2002.

“Keeping More of What You Earn: Strategies for Investment and Wealth Preservation,” speech with Lorraine Thomas at the Women’s Legal Forum, Eugene, Oregon, January 31, 2002.

“An All-Women’s Law School,” paper delivered to the University of Oregon Law School Faculty, Eugene, Oregon, April 17, 2001.

Guest speaker for the Women’s Group at South Eugene High School, Eugene, Oregon, October 26th, 2000.

Participant and speaker at a seminar entitled “The Legal Status of Women in Ukraine,” at Ivan Franko National University of Lviv, Lviv, Ukraine, October 12, 2000.

“Sexual Harassment & Title VIII,” speech to Women’s Forum, South Eugene High School, Eugene, Oregon, December 2, 1999.

“Islamic Law and Discrimination Against Women,” speech at the Women’s International Human Rights Conference, January 27, 1999.

Moderator of panel on “Oregon Gender Fairness Task Force Study” at Women’s Law Conference, Eugene, Oregon, February 27, 1998.

“Surrogacy & Sex: Feminist Approaches to ‘Motherhood’,” speech at the Women and Religion Forum at Unitarian Church, Eugene, Oregon, October 18, 1998.

“Ecofeminism, International Global Development and Tax Policy,” panel on Ecofeminism at the Public Interest Environmental Conference, Eugene, Oregon, March 16, 1997.

“A Virtual All-Women’s Law School,” speech at brown bag lunch for All-Women’s Law Forum, Eugene, October 1997 and October 1996 and at the Toxic Towers: The Impact of Higher Education on Women Conference in Akron, Ohio, August 16, 1997.

“Women and Tax Policy,” speech to the Roseburg Association of University Women meeting, Roseburg, Oregon, March 1996.

“Does Law School and the Legal Field Require Women to be More Like Men to Succeed,” speech at Women’s Law Conference, Eugene, Oregon, February 11, 1995.

## **PAPERS PRESENTED AT PROFESSIONAL MEETINGS**



- “Would You Like a Calculator With That Diploma? Student Loans and Taxes,” panel and paper, Joint ABA Section of Taxation and Real Property, Trust and Estate Law Section, San Francisco, California, September 20, 2013.
- “Taxation and Marriage: Nondiscriminatory Approaches to Spousal Equivalent Relationships,” at Taxation and the Family Conference, Lewis and Clark Law Forum series, Portland, Oregon, October 6, 1995.
- “The Fine Art of Filing,” speech to Washington Lawyers for the Arts, Seattle, Washington, October 10, 1992.
- “Problems of Liquidity: Estate Planning for Small Business and Farmers,” speech to Annual Meeting of American Bar Association, San Francisco, California, August, 1992.
- “Personal and Estate Planning for the Elderly: Financial Issues,” speech to Annual Meeting of the American Bar Association, Honolulu, Hawaii, August 1989.
- “Post Mortem Tax Planning--Income Tax Aspects,” speech to Mid-Year Meeting of the Tax Section of the American Bar Association, Washington D.C., February 1986.
- “International Tax Harmonization and State Taxation of Multinational Corporations,” paper delivered to Anglo-American Business Law Conference, Edinburgh, Scotland, July 1984.
- “Trends In American Legal Research: Implications For Law Scholars,” paper delivered to Anglo-American Business Law Conference, London, England, July 1982.
- “State Taxation of Energy Resources: Are Consuming States Getting Burned?” paper delivered to Mid-Atlantic Regional Business Law Association, Williamsburg, Virginia, March, 1982.
- “Using Tax Incentives to Help Solve the Energy Crisis,” paper delivered to American Business Law Association, Sarasota, Florida, August 1981.
- “Reagan's New Tax Policies: Will They Be Effective and Fair?” paper delivered to Mid-Atlantic Regional Business Law Association, Gettysburg, Pennsylvania, April 1981.
- “The Elimination of Marital Status Discrimination in the Tax Code: Proposed Solutions,” paper delivered to American Business Law Association, San Francisco, California, August 1980.
- “The Windfall Profits Tax - Poor Tax Policy? Poor Energy Policy?” paper delivered to Mid-Atlantic Regional Business Law Association, Fairfax, Virginia, March 1980.
- “DOE Price Controls: Problems in Administrative Process,” paper delivered to American Business Law Association, Hot Springs, Arkansas, August, 1979.

“Travel Expense Deductions for Professors,” paper delivered to Mid-Atlantic Regional Business Law Association, Ocean City, Maryland, March 1979.

“Special Tax Problems of Professors,” paper delivered to Southeastern Regional Business Law Association, October, Knoxville, Tennessee, Spring, 1976.

“Tax Shelter Investments: Current Status, Analysis, and Recommendations,” paper delivered to American Business Law Association, East Lansing, Michigan, August, 1975.

“The Freedom of Information Act: Protection of Corporation Information,” paper delivered to Southeastern Regional Business Law Association, Birmingham, Alabama, October, 1974.

“Sex Discrimination: Corporate Policy and Practice,” paper delivered to American Business Law Association, Waltham, Mass., August, 1974.

## **PUBLIC SERVICE**

### ***Board Memberships***

Early Start (Founder and President—2000 to 2014)

Asian Women and Childrens Center (Co-founder and Board—1998 to 2001)

Elfreth’s Alley Historical Society of Philadelphia, Treasurer (1979 - 1981)

Willamette Institute of Science and Technology (WISTEC) (1984 - 1986)

### ***National***

Senior Editor, Books and Media Committee, Real Estate, Probate and Trust Section of ABA (1994 to present).

Significant Literature Committee of Real Estate, Probate and Trust Section of ABA (Distinguished Service Award for years 1987-1994).

Continuing Legal Education programming for Real Estate, Probate and Trust Section of ABA (planned two meetings each year—1994 to 1998).

Testified on Home Equity Conversions in Hearings of House Committee on Aging, 95th Congress, 2nd Session, Washington D.C. (1982).

### ***State***

Editor for Oregon State Bar Section on Estate Planning and Administration Newsletter, August, 2000 - August 2001; January 2009 - August 2009.

Oregon State Task Force on Gender Fairness—University of Oregon Legal Education Team (helped with the student survey, wrote the faculty survey, and wrote education section of the final report) (1996-97).

Attended biweekly meetings in Salem on joint legislative committee on state tax reform (Fall 1995).

### ***University of Oregon***

#### **Committees**

Dissertation Committee for Krystal Noga-Styron (2018-2019)  
University Committee on Sexual and Gender-Based Violence (2017-2018)  
Campus Fulbright Scholarship Committee (2016-2017)  
Meetings of Big Idea Group of Economics, Business and Tax Professors (2011-2012)  
Sustainable Cities Initiative—Big Idea Committee (2010-2011)

### ***Law School***

#### **Committees**

Academic Standing Committee (2012-2013, 2007-2008, 1999-2000, Chair, 1998-1999, 1997-1998, 1994-1995)  
Academic Success Committee, (2018-2019)  
Admission Committee (1999-2000, 2001-2002)  
Appointments Committee (2006-2007)  
Building and Sustainability (Chair, 2010-2011, 2013-2014; 2014-2015; Chair, 2015-16)  
Curriculum Committee (2016-2017)  
Diversity Committee (Chair, Spring 2009, 2008-2009, Co-chair, 2006-2007)  
Faculty Advisor: Law Students of Choice (2006-2007)  
Financial Aid Committee (1994-1995, 1999-2000, 2001-2002)  
Hiring Committee for Assistant for Career Services (Spring 2009)  
Lectures and Awards Committee (2003-2004)  
Library Committee (2001-2002) (2012-2013) (2013-2014) (2016-2017)  
Minority Students Committee (Chair, 1987-88, 1993-94)  
Personnel Committee (1984-1985)  
Portland Programs (2015-1016)  
Pro Bono Committee (2004-2005)  
Scholarship Committee (2005-2006) (Chair, 2014-2015)  
Women and Law Committee (Chair, 1984-85)

#### **Tax Program**

Tax Moot Court Coach (2001 to 2008)  
Tax Moot Court Judge (2008 to present)  
IRS Internship Supervisor (2002 to 2012)  
Tax & Estate Planning Newsletter (2003)

Tax Newsletter (2006)

Fundraiser Letter for Administration (2007)

Teaching Awards

Orlando Hollis Award for Distinguished Teaching (2000)