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# Mark Merric JD, CPA, MT

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## Business Background

In addition to being an attorney, Mark Merric is a certified public accountant, holds a masters of taxation, and is a adjunct professor for the University of Denver Graduate Tax Program. Mr. Merric is the manager of the Merric Law Firm, LLC, and a manager of the Alliance of International Legal Counselors, LLC. He is active in the areas of domestic and offshore asset protection, domestic and international estate planning and international business transactions. Prior to practicing as an attorney, Mark Merric developed a strong business background practicing as a Certified Public Accountant for over twelve years. During this time, he worked for a Fortune 500 Company, Final Four Accounting Firm, two local accounting firms, and managed his own accounting firm.

## Quoted In

Mr. Merric has been quoted in

◆ Forbes	◆ Wall Street Journal
◆ Investor News	◆ Oil and Gas Investor
◆ The Street	◆ Denver and Sioux Falls Business Journals

## Public Speaking

Mr Merric has spoken at over 300 seminars, and currently he speaks nationally over two dozen times a year. Typically, Mr. Merric scores a 4.7+ on speaking engagements with 5 being the highest score. He is past President of Stanford Place Toastmasters with both CTM and ATM designations. A list of some of the organizations that Mark Merric has spoken to is detailed below:

### National Estate Planning Forums

Notre Dame Tax & Estate  
Planning Institute  
Indiana, 2007 & 2009

Southern California Tax &  
Estate Planning Forum  
2006, 2007, 2008

### International Presentations

Fudan University  
Shanghai, China  
2004

International Business Companies  
Grand Cayman, Cayman Islands  
1999

Offshore Institute  
San Francisco, CA  
1999

### National Speaking Organizations

National Association of Elder  
Law Attorneys (NAELA)  
2006

American Association of Attorneys  
and Certified Public Accountants  
2003

### Financial Industry

LIMRA International Insurance  
Conference  
2005 and 2006

Society of Financial Service  
Professionals , Ntl. Conf.  
January 2001

International Association of  
Financial Planners, Ntl. Conf.  
2000

### Estate Planning Organizations

WealthCounsel Forums  
San Diego, CA  
2002-2004, 2006, 2008, 2009

National Network of Estate  
Planners Collegiums  
2001, 2005, 2007, 2009, 2010

### Continuing Education

Chicago Bar Association  
Chicago, Illinois  
2003, 2007, 2008, 2009

Ohio Bar Association  
Columbus & Cleveland, OH  
2003-2005, 2007-2009

University of Denver  
5 day seminar  
2007, 2008, 2009

## Publications

In addition to being a national speaker, Mark Merric is a listed commentator on Steve Leimberg’s LISI service. He has published over 55 articles regarding offshore asset protection trusts, international tax planning, and domestic estate planning, and is honored to have had three, four, and five part articles published by Estate Planning Magazine, Journal of Practical Estate Planning, and Stephan Leimberg’s Estate Planning and Asset Protection Planning LISIs. Some of the more significant articles are:

- ◆ *Which Situs is Best*, Trusts and Estates, Jan. 2010, coauthor Dan Worthington.
- ◆ *Income Only Medicare Trust as an Asset Protection Tool for the Middle Class*, Trusts and Estates, April 2010, coauthor Robert D. Gillen.
- ◆ *Beware of Super Federal Creditors, Can Traditional Asset Protection Planning Tools Withstand Their Reach?* July 2010, coauthor with Michael Bland and Mark Monasky.
- ◆ *Drafting Discretionary Dynasty Trusts*, Estate Planning Magazine, three part article Jan. 2009 – March 2009
- ◆ *Who Can Be a Trustee, Without an Estate Inclusion Issue*, Leimberg LISIs – six part article beg. March 2009
- ◆ *Spousal Access Trusts*, Leimberg LISIs, three part article, Aug 2008 – Dec 2008, coauthor Rod Goodwin.
- ◆ *Reciprocal Trusts*, Leimberg LISIs, five part article, Mar 2008 – Sep 2008
- ◆ *Charging Order Protection*, Leimberg LISIs, four part article, Aug 2007- Apr 2008, coauthor Bill Comer.

In addition to the many articles, Mr. Merric is a co-author on the following treatises:

- ◆ American Bar Associations treatise, *Asset Protection Strategies, Volume II*, published in 2005 Mr. Merric was responsible for close to 1/5 of the treatise.
- ◆ American Bar Associations treatise, *Asset Protection Strategies, Volume I*, published in 2002 Mr. Merric was the only author to author two chapters in this treatise
- ◆ CCH’s treatise on asset protection, *The Asset Protection Planning Guide – A State-of-the-Art Guide to Integrated Estate Planning*, published in 2000.

## Licenses, Certifications and Languages

Mark Merric holds the following licenses, certifications or memberships:

◆ Attorney	◆ Certified Public Accountant
◆ Masters of Taxation	◆ Some Mandarin Chinese

## Education and Teaching Experience

Mark Merric has the following degrees and teaching experience.

- ◆ Adjunct Professor for the University of Denver Graduate Tax Program 1998-present
- ◆ University of Denver – College of Law Law Degree 1995
- ◆ University of Denver – Graduate Tax Program Masters of Taxation 1989
- ◆ University of Colorado – Magna Cum Laude B.S. Accounting 1980