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**Merric Law Firm, LLC**

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## **Mark Merric JD, CPA, MT**

### **Business Background**

Mr. Merric is the manager of the Merric Law Firm, LLC, a manager of the Alliance of International Legal Counselors, LLC, and a manager of China–U.S. Import Export Sourcing Company. 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 Final Four Accounting Firm, two local accounting firms, and managed his own accounting firm.

### **Education and Teaching Experience**

Mark Merric has the following degrees and teaching experience.

- |   |                     |      |
|---|---------------------|------|
| ◆ 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 |

Currently, Mark Merric teaches as an adjunct professor in estate planning at the University of Denver’s Law School Graduate Tax Program, which is typically ranked as one of the top four graduate tax programs in the nation. He teaches both the Estate Planning and International Taxation courses.

### **Licenses, Certifications and Languages**

Mark Merric holds the following licenses, certifications or memberships:

◆ Attorney	◆ Certified Public Accountant
◆ Masters of Taxation	◆ Some Mandarin Chinese
* Past Designations: ◆ Certified Internal Auditor	◆ Certified Management Accountant* ◆ Accredited Financial Planning Specialist*

## Public Speaking

Mr Merric has spoken at over 300 conferences, and currently he speaks nationally over three 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, Oct 2007

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

### International Presentations

Fudan University  
Shanghai, China  
June 2004

International Business Companies  
Grand Cayman, Cayman Islands  
December 1999

Offshore Institute  
San Francisco, CA  
November 1999

### National Speaking Organizations

National Association of Elder  
Law Attorneys (NAELA)  
Salt Lake City, UT Nov. 2006

American Association of Attorneys  
and Certified Public Accountants  
Las Vegas, NV Nov. 2003

### Financial Industry

LIMRA International Insurance  
Conference  
Aug. 2005 and Aug. 2006

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

International Association of  
Financial Planners, Ntl. Conf.  
Salt Lake City, UT Nov 2000

### Estate Planning Organizations

WealthCounsel Forums  
San Diego, CA  
2002, 2003, 2004, 2006, 2008

National Network of Estate  
Planners Collegiums  
Sept. 2001, 2005, & 2007

### Continuing Education

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

Ohio Bar Association  
Columbus & Cleveland, OH  
2003, 2004, 2005, 2007, 2008

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 50 articles regarding offshore asset protection trusts, international tax planning, and domestic estate planning, and is one of the few authors that 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. 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.

## Quoted In

Mr. Merric has been quoted in Forbes, Investor's News, On the Street, the Denver Business Journal, Oil and Gas Investor, and the Sioux Falls Business Journal.