



Mark Merric JD, CPA, MT



Business Background

In addition to being a certified public accountant, Mark Merric is an attorney, holds a master of taxation, and is an adjunct professor for the University of Denver Graduate Tax Program. Mr. Merric is the Manager of Merric Law Firm, LLC where he concentrates on estate planning, asset protection planning, and business succession planning. Mark Merric has over thirty years of business experience working for a Final Four accounting firm, Fortune 500 Company, one of Denver's oldest and largest law firms, Holme, Roberts & Owen, LLP ("HRO"), as well as local CPA firms and law firms.

Quoted In

Mr. Merric has been quoted in

- ◆ Forbes
- ◆ The Boston Herald
- ◆ Investors News
- ◆ The Street



- ◆ Wall Street Journal
- ◆ Oil and Gas Investor
- ◆ Denver Business Journal
- ◆ Sioux Falls Business Journal

Public Speaking

Mr Merric has spoken at over 400 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, 2008-2011

International Presentations

Fudan University
Shanghai, China
2004, 2011

Qingdao, Shenan District Govnt.
Qingdao, China
2011

International Business Companies
Grand Cayman, Cayman Islands
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.

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

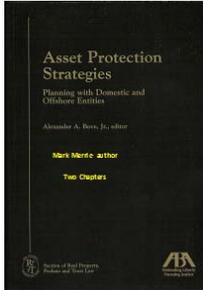
Continuing Education

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

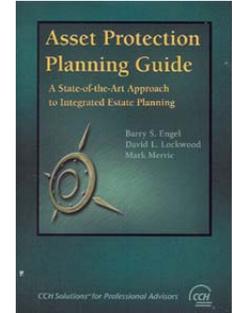
Ohio Bar Association
Columbus & Cleveland, OH
2001, 2003-2005, 2007-2009

University of Denver
5 day seminar
2007, 2008, 2009, 2010

Publications



In addition to being a national speaker, Mark Merric is a listed commentator on Steve Leimberg's LISI service. He has published over 70 articles regarding domestic estate planning, asset protection planning, and international taxation 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 and Jan. 2012, coauthor Dan Worthington.
- ◆ *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, seven part article, Aug 2007- June 2010, coauthor Bill Comer.

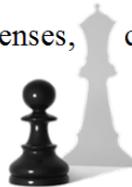
In addition to the many articles, Mr. Merric is a co-author on the following treatises:

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



Education and Teaching Experience

Mark Merric has the following degrees and teaching experience.

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| ◆ 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 |