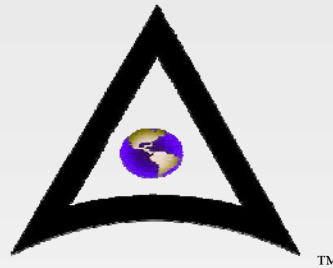


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**Merric Law Firm, LLC**

**Mark Merric**

## Speaking Engagements

Currently, Mark Merric has spoken nationally and internationally at over 400 conferences. Currently, he speaks close to three dozen times a year. He received one of the highest evaluations that a speaker has ever received from the WealthCounsel, E Planners, the Texas Medical Association, Tallahassee Estate Planning Council, the Chartered Life Underwriters, the Better Business Bureau, and the International Association of Financial Planners (now FPA). The more significant presentations are listed immediately below, followed by a chronological listing of speaking engagements.

### **Estate Planning Forums**

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

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

WealthCounsel Forums  
Las Vegas, NV  
2002, 2004, 2006, 2008, 2009

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

E-Planners  
All day  
2003, 2005, 2006, 2008

### **Health Industry**

Texas Medical Association  
San Antonio, TX  
2002

Oklahoma Neurological  
Okla. City, TX  
Physicians 2002

Arkansas Health Care  
Little Rock, AK  
2002

### **National Speaking Org.**

National Association of  
Elder Law Attorneys  
2006

American Association of  
Attorney-Accountants  
Las Vegas, NV 2003

University of Denver  
Five – one day Estate Planning  
2007, 2008, 2009

National Business Institute  
10 locations Nationally  
Aug – 2005 thru July 2006

Professional Education System  
Ntl. Seminars  
1999, 2000, 2001

### **Financial Industry**

John Hancock  
National Radio Program  
2009

Society of Financial Service  
Professionals - Ntl Conf.  
2001

International Association of  
Financial Planners (now FPA)  
2000

### **International Presentations**

Fudan University  
Shanghai, China  
2004, 2011, 2014

Shanghai Bar Association  
Shanghai, China  
2014

Shandong Bar Association  
Jinan, China  
2014

China Council For Promotion of  
International Trade  
Kunming, China 2014

Qingdao Bar Association  
Qingdao, China  
2014

### **Continuing Education**

Chicago Bar Association  
Chicago, IL  
2004, 2007, 2008, 2009

Massachusetts Bar Association  
Boston, MA  
2009

Ohio Bar Association  
Columbus & Cleveland  
2003- 2005; 2006-2009

The following list details these and many other speaking engagements chronologically:

<b>Group/Event/ Subject</b> (439-13)	<b>Location</b>	<b>Date</b>
Investing in the U.S. Allbright Law Firm 1 hr. Presentation	Qingdao, China	May 2014
Structuring Business Entities Between China and the U.S. Qingdao Bar Association All Day Presentation	Qingdao, China	May 2014
Estate Planning When Investing in the U.S. Exporting Goods to the U.S.; Buying U.S. Real Estate Shandong Bar Association All Day Presentation	Jinan, China	May 2014
How Did Google Do It? Treaty Shopping Fudan University, Master of Taxation Program All Day Presentation	Shanghai, China	May 2014
Exporting Goods to the U.S. Fudan University, Master of Taxation Program All Day Presentation	Shanghai, China	May 2014
Investing in U.S. Real Estate Fudan University, Master of Taxation Program All Day Presentation	Shanghai, China	May 2014
Investment Income in the U.S. Fudan University, Master of Taxation Program All Day Presentation	Shanghai, China	May 2014
Introduction to U.S. & China Taxation Fudan University, Master of Taxation Program All Day Presentation	Shanghai, China	May 2014
Estate & Gift Tax Basics CPE4U All Day Presentation	Denver, CO	Dec 2013
Business Formation Succession CPE4U All Day Presentation	Denver, CO	Dec 2013

Year End Tax Updates Accounting Educational Systems All Day Presentation	5 locations, CA	Dec 2013
Year End Tax Updates Accounting Educational Systems All Day Presentations	White Plains, NY	Dec 2013
Year End Tax Updates Accounting Educational Systems All Day Presentation	Saddle Brook, NJ	Dec 2013
Year End Tax Updates Accounting Educational Systems All Day Presentation	Philadelphia, Penn	Dec 2013
Year End Tax Updates Accounting Educational Systems All Day Presentation	Reno, Nevada	Dec 2013
Year End Tax Updates Accounting Educational Systems All Day Presentation	4 locations, NY	Nov 2013
Doing Business in China World Trade Center ½ Day Presentation	Denver, Co	Nov 2013
Exporting to the U.S. China Council for the Promotion of International Trade ½ Day Presentation	Kunming, China	Oct 2013
Buying U.S. Mineral Interests Dacheng Law Firm ½ Day Presentation	Shanghai, China	Oct 2013
Investing in the U.S. Shanghai Bar Association ½ Day Presentation	Shanghai, China	Oct 2013
Estate & Gift Tax Basics CPE4U All Day Presentation	Denver	Oct 2013
Estate Planning Tools CPE4U All Day Presentation	Denver	Sept 2013
International Tax Inbound CPE4U All Day Presentation	Denver	Sept 2013

Qingdao International Business Association Doing Business in the U.S.	Qingdao	Sept 2013
Qingdao Business Groups Legal and Tax Aspects Doing Business U.S. ½ Day	Qingdao, China	August 2013
International Tax – Inbound CPE4U All Day Presentation	Denver	August 2013
Estate Planning Tools CPE4U All Day Presentation	Denver	July 2013
Business Operation & Succession CPE4U All Day Presentation	Denver	July 2013
International Tax – Outbound CPE4U All Day Presentation	Denver	July 2013
Estate Planning Tools CPE4U All Day Presentation	Denver	July 2013
Estate & Gift Tax Basics CPE4U All Day Presentation	Denver	June 2013
Estate & Gift Tax Basics University of Denver All Day Presentation	Denver	Nov 2012
Estate Planning Tools University of Denver All Day Presentation	Denver	Nov 2012
Treaty Shopping and How Did Google Do It? GHP Horwath SEC Update	Denver	October 2012
Business Formation, Operation, & Succession University of Denver All Day Presentation	Denver	October 2012
Estate & Gift Tax Basics University of Denver All Day Presentation	Denver	October 2012



Estate Planning Tools University of Denver All Day Presentation	Denver	Sept 2012
International Taxation – Inbound University of Denver All Day Presentation	Denver	Sept 2012
International Taxation – Outbound University of Denver All Day Presentation	Denver	September 2012
Treaty Shopping & Chinese Person Buying U.S. Mineral Interests World Trade Center, Denver	Denver	July 2012
Interest Charged DISC World Trade Center, Denver	Denver	July 2012
Estate Planning Tools University of Denver All Day Presentation	Denver	July 2012
Business Formation, Operation, and Succession University of Denver All Day Presentation	Denver	July 2012
International Taxation – Inbound University of Denver All Day Presentation	Denver	July 2012
International Taxation – Outbound University of Denver All Day Presentation	Denver	June 2012
Estate and Gift Tax Basics University of Denver All Day Presentation	Denver	June 2012
National Webinar Discretionary Dynasty Trusts – Part I	National	May 2012
National Webinar Discretionary Dynasty Trusts – Part I	National	March 2012
University of Denver Estate Planning Updates 1 hr. presentation	Denver	Dec. 2011

HRO/GHP Joint Presentation Doing Business in China ½ day presentation	Denver	Nov. 2011
Southern California Tax & Estate Planning Forum Discretionary Dynasty Trusts Domestic Asset Protection Trusts (2 Separate presentations)	San Diego, CA	Oct. 2011
University of Denver Estate Planning Tools All Day Presentation	Denver, CO	Sept. 2011
University of Denver Estate & Gift Taxation - Basics All Day Presentation	Denver, CO	Sept. 2011
University of Denver Estate Planning Tools All Day Presentation	Denver, CO	July 2011
University of Denver Estate & Gift Taxation - Basics All Day Presentation	Denver, CO	July 2011
Fudan Law School International Taxation – Export Transactions 2 Hour Presentation	Shanghai, China	June 2011
Qingdao Central Business Government International Business Transactions 2 Hour Presentation	Qingdao, China	June 2011
University of Denver Estate & Gift Taxation - Basics All Day Presentation	Denver, CO	May 2011
Holme Roberts & Owen LLP New Tax Act Update for Financial Planners ½ Hour Presentation	Denver, CO	March 2011
Holme Roberts & Owen LLP New Tax Act Update for Accountants ½ Hour Presentation	Denver, CO	February 2011
University of Denver Tax Updates Four 1 Day Seminars	4 different cities throughout the nation	January 2011

University of Denver Tax Updates Five 1 Day Seminars	5 different cities throughout the nation	December 2010
University of Denver Annual Estate Planning Tool Update Two Hour Presentation	Denver, CO	December 2010
Holme Roberts & Owen LLP Ethics and Fraudulent Conveyance Issues Two Hour Presentation	Denver, CO	December 2010
Holme Roberts & Owen LLP Who Can Be a Trustee Part II Two Hour Presentation	Denver, CO	December 2010
Holme Roberts & Owen LLP Who Can Be a Trustee Part I Two Hour Presentation	Denver, CO	November 2010
University of Denver Estate Planning Tools All Day Seminar	Denver, CO	November 2010
University of Denver Estate & Gift Tax Basics All Day Seminar	Denver, CO	November 2010
Holme Roberts & Owen LLP Estate Planning Octopus 2 Hour Presentation	Denver, CO	November 2010
HRO Annual Accountant Seminar Discretionary Dynasty Trusts 45 min Presentation	Denver, CO	November 2010
Southern California Tax & Estate Planning Forum Asset Protection of Trust Interests (2 Day Seminar – Co-speaker)	San Diego, CA	October 2010
University of Denver Business Formation, Operation, Succession (All Day Seminar)	Denver, CO	October 2010
University of Denver Estate Planning Tools All Day Seminar	Denver, CO	September 2010

University of Denver Estate & Gift Tax Basics All Day Seminar	Denver, CO	September 2010
University of Denver 5 Day Seminar Estate Planning	Las Vegas, NV (5 day)	September 2010
North Dakota Medical Association Estate planning & Asset protection All day seminar	Fargo	September 2010
Holme Roberts & Owen LLP 529 Plans Discretionary Dynasty Trust Presentation	Denver, CO	August 2010
Holme Roberts & Owen LLP 529 Plans 2 hour presentation	Denver, CO	August 2010
Holme Roberts & Owen LLP Basic Gift Tax Rules 2 hour presentation	Denver, CO	August 2010
University of Denver Business Formation, Operations, Succession One Day Seminar	Denver, CO	June 2010
University of Denver Estate & Gift Tax Basics One Day Seminar	Denver, CO	May 2010
North Dakota Medical Association Estate planning & Asset protection All day seminar	Bismarck	April 2010
National Webinar Types of Estate Planning Trusts 1 ½ hour program	National Broadcast	March 2010
National Webinar Basic Estate and Gift Tax Rules 1 ½ hour program	National Broadcast	Jan 2010
University of Denver Annual Tax Update	Denver, CO	December 2009
University of Denver Tax Updates Eight 1 Day Seminars	8 different cities throughout the nation	November 2009



University of Denver Estate Planning Tools One Day Seminar	Denver, CO	November 2009
University of Denver Estate and Gift Tax Basics One Day Seminar	Denver, CO	November 2009
University of Denver 5 Day Seminar Estate Planning	Las Vegas, NV (5 day)	November 2009
National Webinar Who Can Be a Trustee 1 ½ hour presentation	Denver, CO	October 2009
Ohio Bar Association All day seminar Asset Protection Seminar	Cleveland Columbus	September 2009
University of Denver Planning for the \$2 M to \$4 M Estate ½ Day Seminar	Denver, CO	September 2009
University of Denver Estate and Gift Tax Mechanics ½ Day Seminar	Denver, CO	August 2009
National Webinar Grantor Trust Rules 1 ½ hour presentation	Denver, CO	July 2009
National Webinar Discretionary Dynasty Trusts Part II 1 ½ hour presentation	Denver, CO	June 2009
University of Denver Estate Strategies One Day Seminar	Denver, CO	June 2009
University of Denver Estate Planning Tools One Day Seminar	Denver, CO	June 2009
National Webinar Discretionary Dynasty Trusts Part I 1 ½ hour presentation	Denver, CO	June 2009
University of Denver Estate and Gift Tax Basics One Day Seminar	Denver, CO	June 2009

Birmingham Estate Planning Counsel Asset Protection Planning Tools 2 ½ hour presentation	Birmingham, AL	May 2009
University of Denver 5 Day Seminar Business Succession & Post Mortem Planning	Las Vegas, NV (5 day)	May 2009
National Webinar Offshore Asset Protection Trusts 1 ½ hr. Program	National Broadcast	Apr 2009
National Webinar Asset Protection Behind a Charging Order 1 ½ hr program	National Broadcast	Mar 2009
Chicago Bar Association Sixth Annual Asset Protection Symposium Spoke 1/3 of both two days of the seminar	Chicago, IL	Mar 2009
University of Denver 5 Day Seminar Estate & Asset Protection Planning	Denver, CO (5 day)	Mar 2009
Bernstein Law Firm Asset Protection ½ day presentation	Boston MA	Feb 2009
Massachusetts Bar Assoc. Asset Protection Behind a Charging Order 1 hr. program	Boston, MA	Feb 2009
National Webinar Domestic Asset Protection Trusts 1 ½ hour program	National Broadcast	Feb 2009
National webinar Reciprocal & Spousal Access Trusts 1 ½ hour program	National Broadcast	Jan 2009
AVIVA Insurance Half day seminar Discretionary Dynasty Trusts	Dallas, TX	Jan 2009
John Hancock – Radio Program 1,000 + listeners Domestic Asset Protection Trusts	National Broadcast	Jan 2009
Accountant’s Education Services Graduate Tax Program Year 2007 Tax Update – 10 one day seminars	10 locations throughout. the U.S.	Dec 2008

University of Denver Half day seminar Asset Protection Entities of Choice	Denver, CO	Nov. 2008
Virchow Krauss Firm Wide Telephone Conference Minority/Marketability Discounts	Denver, CO	Nov. 2008
University of Denver One day seminar Estate Planning Tools	Denver, CO	Nov. 2008
University of Denver One day seminar Estate & Gift Tax Basics	Denver, CO	Nov. 2008
University of Denver Half-day seminar Modular Approach Estate & Business Succession	Denver, CO	Nov. 2008
University of Denver 5 Day Seminar Estate & Asset Protection Planning	Miami, FL (5 day)	Oct 2008
Southern California Tax & Estate Planning 2 Plenary & 1 Break Out Session Family Limited Partnerships; Asset Protection Entities of Choice	San Diego, CA	Oct. 2008
University of Denver Half-day seminar Estate Planning Tools - Introduction	Denver, CO	Oct. 2008
E-Planners One day seminar Advanced Estate Planning	New Orleans	Oct. 2008
University of Denver Half-day seminar Planning for the \$2 M to \$4 M Estate	Denver, CO	Sept. 2008
South Dakota Bar Association All day seminar Asset Protection Seminar	Sioux Falls SD	Sept. 2008
University of Denver Half-day seminar Estate & Gift Tax Returns	Denver, CO	Sept. 2008

Ohio Bar Association All day seminar Asset Protection Seminar	Cleveland Columbus	July 2008
University of Denver All day seminar Estate Planning Strategies	Denver, CO	June 2008
WealthCounsel Annual Retreat Modular Approach to Estate Planning	San Antonio, TX	June 2008
Texas Bar Association Advanced Estate Planning Seminar Asset Protection	Dallas, TX	June 2008
University of Denver All day seminar Estate Planning Tools	Denver, CO	June 2008
University of Denver All day seminar Estate & Gift Tax Basics	Denver, CO	June 2008
University of Denver 5 Day Seminar Estate & Asset Protection Planning	Las Vegas, NV (5 Day)	May 2008
Boulder Estate Planning Council Morning Presentation Discretionary Dynasty Trusts	Longmont, CO	April 2008
Chicago Bar Association All day seminar Domestic & Offshore Asset Protection Planning	Chicago, IL	March 2008
Accountant's Education Services Graduate Tax Program Year 2007 Tax Update – 10 one day seminars	10 locations throughout. the U.S.	Dec 2007- Jan. 2008
University of Denver's Estate Planning Forum Five One Day Seminars – Estate Planning	Orlando Florida (5 Day)	Nov 2007
University of Denver All day seminar Estate & Gift Tax Basics	Denver Colorado	Nov 2007
University of Denver All day seminar Estate Planning Tools	Denver Colorado	Nov 2007

Southern California Tax & Estate Planning Forum Where to Site a Discretionary Trust Grantor Trust Rules	San Diego, California	Oct. 2007
Notre Dame Tax & Estate Planning Institute Asset Protection Entities of Choice	Indianapolis Indiana	Oct 2007
Ohio Bar Association All day seminar Domestic & Offshore Asset Protection	Columbia Cleveland Ohio	Oct 2007
National Network of Estate Planning Attorneys UTC's Affect on Beneficiary Controlled Trusts	Atlanta Georgia	Oct 2007
Colorado Bar Association Elder Law Third Party Special Needs Trusts	Denver Colorado	Sept. 2007
Centennial Estate Planning Council Morning Seminar Discretionary Trusts	Lakewood, Colorado	Sept. 2007
Centennial Estate Planning Council Morning Seminar Discretionary Trusts	Lakewood, Colorado	July 2007
University of Denver One Day Seminar Estate Planning Strategies	Denver, Colorado	June 2007
University of Denver One Day Seminar Estate Planning Tools	Denver, Colorado	May 2007
University of Denver One Day Seminar Estate and Gift Taxation	Denver, Colorado	May 2007
Chicago Bar Association One Day Seminar Discretionary Dynasty Trusts/ Domestic APTs	Chicago Illinois	Mar. 2007
University of Denver One Day Seminar Estate Planning Strategies	Denver, Colorado	Feb. 2007

University of Denver One Day Seminar Estate Planning Tools	Denver, Colorado	Feb. 2007
University of Denver One Day Seminar Estate and Gift Taxation	Denver, Colorado	Feb. 2007
University of Denver One Day Seminar Tax Updates	8 Locations, Through U.S.	Nov.- Dec. - 2006
University of Denver One Day Seminar Estate Planning Tools	Denver, Colorado	Nov. 2006
University of Denver One Day Seminar Estate and Gift Taxation	Denver, Colorado	Nov. 2006
National Association of Elder Law Panel Speaker Uniform Trust Code	Salt Lake City, Utah	Nov. 2006
Southern California Tax & Estate Planning Forum Afternoon Presentation Planning with Discretionary Trusts	San Diego, California	Oct. 2006
Entrust Presentation Morning Presentation Asset Protection	Las Vegas, Nevada	Oct. 2006
National Business Institute Morning Presentation Asset Protection for Physician Client	Denver, Colorado	Sept. 2006
National Business Institute One Day Seminar Asset Protection for Physician Client	Gainsville, South Carolina	Sept. 2006
National Business Institute One Day Seminar Asset Protection for Physician Client	Columbia, South Carolina	Sept. 2006
National Business Institute One Day Seminar Asset Protection for Physician Client	Pittsburg, Pennsylvania	Sept. 2006

Idaho Bar Association Annual Convention -1/2 day presentation Asset Protection	Sun Valley, Idaho	Sept. 2006
Southern Nevada Estate Planning Council Monthly Meeting Uniform Trust Code	Las Vegas, NV	Sept. 2006
E-Planners Quarterly Meeting Grantor Trust Rules	Overland Park, KS	July 2006
National Business Institute One Day Seminar Domestic & Offshore Asset Protection Planning	Denver, CO	July 2006
University of Denver One Day Seminar Offshore Estate & Financial Transactions	Denver, CO	July 2006
University of Denver One Day Seminar Estate Planning Strategies	Denver, CO	June 2006
National Business Institute Two Day Seminar Modular Approach to Estate Planning	Overland Park, KS	Jun 2006
National Business Institute Two Day Seminar Modular Approach to Estate Planning	Little Rock, Arkansas	Jun 2006
National Business Institute Two Day Seminar Modular Approach to Estate Planning	Phoenix, AZ	Jun 2006
University of Denver One Day Seminar Estate Planning Tools	Denver, CO	May 2006
University of Denver One Day Seminar Estate Planning Tools	Denver, CO	May 2006
University of Denver One Day Seminar Estate & Gift Taxation - Basics	Denver, CO	May 2006
WealthCounsel National Conference Asset Protection Planning Update	San Diego, CA	May 2006

Las Vegas Estate Planning Council Local Seminar Domestic & Offshore Asset Protection Planning	Las Vegas, NV	Mar 2006
WealthCounsel Two Day Seminar Domestic & Offshore Asset Protection Planning	Denver, CO	Mar 2006
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	Helena, MT	Jan 2006
Accountant's Education Services Graduate Tax Program Year 2005 Tax Update – 10 one day seminars	10 locations throughout. the U.S.	Nov 2005- Jan. 2006
Virshow Krause– CPA Firm All Day Seminar Estate Planning For High Net Worth Clients	Green Bay, WI	Dec 2005
University of Denver Estate Tax Update Tax Updates	Denver, CO	Dec 2005
University of Denver All Day Seminar Tax Updates (5 Seminars)	California	Dec 2005
Moss-Adams – CPA Firm All Day Seminar Estate Planning For High Net Worth Clients	Seattle, WA	Nov 2005
University of Denver All Day Seminar Estate Planning Tools	Denver, CO	Nov 2005
Colorado Estate Planning Educational Council Afternoon Seminar Uniform Trust Code	Denver, CO	Nov 2005
University of Denver All Day Seminar Estate & Gift Taxation	Denver, CO	Nov 2005
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	Concord, NH	Oct 2005
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	Seattle, WA	Oct 2005



Jackson Medical Group Evening presentation Domestic & Offshore Asset Protection	Jackson, WY	Sept 2005
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	Philadelphia, PA	Sept 2005
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	Denver, CO	Sept 2005
National Network of Estate Planners All Day Seminar Asset Protection After the Bankruptcy Act	Scottsdale, AZ	Sept 2005
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	St. Louis, MO	Sept 2005
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	Tampa, FL	Aug 2005
Asset Protection Planning Tools After the Bankruptcy Code, <i>In re Ehnman, and Rousey</i> Key Note Speaker LIMRA International Insurance Conference	San Francisco, CA	Aug 2005
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	Miami, FL	Aug 2005
National Business Institute All Day Seminar Domestic & Offshore Asset Protection	New Haven, Conn	Aug 2005
Ohio Bar Association All Day Seminar Domestic & Offshore Asset Protection	Cleveland, OH	Aug 2005
Ohio Bar Association All Day Seminar Domestic & Offshore Asset Protection	Cincinnati, OH	Aug 2005
Centennial Estate Planning Council Morning Presentation Offshore Estate and Domestic Estate Planning	Denver, CO	July 2005

University of Denver All Day Seminar Offshore Estate and Financial Planning	Denver, CO	June 2005
Westlaw 1 hour webcast Asset Protection Tools After the Bankruptcy Act	Webcast	June 2005
E-planners A Day and one-half Seminar Domestic and Offshore Asset Protection	Wichita, KS	June 2005
University of Denver All Day Seminar Estate Planning Tools	Denver, CO	May 2005
University of Denver All Day Seminar Estate & Gift Taxation – Basics	Denver, CO	May 2005
Family Law Practices Morning Seminar Updates in Colorado Trust Law	Denver, CO	Mar. 2005
University of Denver All Day Seminar Estate Planning Tools	Denver, CO	Feb. 2005
University of Denver All Day Seminar Estate Planning Tools	Denver, CO	Jan. 2005
University of Denver All Day Seminar Estate & Gift Taxation – Basics	Denver, CO	Jan 2005
Accountant's Education Services Graduate Tax Program Year 2002 Tax Update – 19 one day seminars	19 locations throughout. the U.S.	Nov 2004- Jan. 2005
University of Denver All Day Seminar Estate Planning Tools	Denver, CO	Nov. 2004
University of Denver All Day Seminar Estate & Gift Taxation – Basics	Denver, CO	Nov. 2004
Statutory Review Committee - Colorado Monthly Meeting Uniform Trust Code	Denver, CO	Oct. 2004

Centennial Estate Planning Counsel Monthly Meeting Uniform Trust Code	Lakewood, CO	Sep. 2004
Wyoming Estate Planning Advisory Counsel Monthly Meeting Uniform Trust Code	Cheyenne, WY	Sep. 2004
LIMRA Advanced Sales Conference Break Out Session Beneficiary Controlled Trusts & Other Asset Protection Tools (Invited back as a platform speaker 2005)	Chicago, IL	Aug. 2004
WealthCounsel Break Out Session CCH's ViewPlan Software	Denver, CO	July 2004
WealthCounsel Break Out Session Uniform Trust Code	Denver, CO	July 2004
WealthCounsel Break Out Session Beneficiary Controlled Trusts	Denver, CO	July 2004
Ohio Bar Association One Day Seminars Domestic & Offshore Asset Protection	Columbus/ Cleveland	July 2004
University of Denver One Day Seminar Offshore Financial and Estate Planning	Denver, CO	June 2004
Fudan University (Almost the Harvard Law School of China) 2 hour Seminar China Businesses in the U.S.	Shanghai, China	June 2004
University of Denver One day Seminar Estate Planning Basics	Denver, CO	May 2004
Austin Estate Planning Council 1/2 day seminar Uniform Trust Code Domestic & Offshore Asset Protection	Austin, TX	Apr 2004

WealthCounsel 2 day seminar Domestic & Offshore Asset Protection	Las Vegas, NV	Apr. 2004
South East Suburban Estate Planning Council Monthly meeting Uniform Trust Code	Englewood, CO	Apr 2004
WealthCounsel – Denver Chapter Two Hour Presentation Uniform Trust Code	Denver, CO	Apr 2004
Financial Planning Association – Hawaii Two one hour presentations Asset Protection & Uniform Trust Code	Honolulu, Hawaii	Mar 2004
Chicago Bar Association One Day Seminar Asset Protection & Uniform Trust Code	Chicago, Ill.	Feb 2004
National Business Institute One Day Seminar Domestic & Offshore Asset Protection	Denver, CO	Feb 2004
University of Denver Graduate Tax Program One Day Seminar International Estate Planning & Finance	Denver, CO	Feb 2004
University of Denver Graduate Tax Program One Day Seminar Estate & Gift Taxation	Denver, CO	Jan 2004
University of Denver Graduate Tax Program One Day Seminar Estate Strategies	Denver, CO	Jan 2004
Accountant’s Education Services Graduate Tax Program Year 2003 Tax Update – Ten one day seminars	10 locations throughout. the U.S.	December 2003
University of Denver Graduate Tax Program One Day Seminar Estate & Gift Taxation	Denver, CO	Nov 2003
University of Denver Graduate Tax Program One Day Seminar Estate Strategies	Denver, CO	Nov 2003

American Association of Attorneys & Certified Public Accountants Annual Meeting Domestic & Offshore Asset Protection	Las Vegas, NV	Nov. 2003
Northeastern Michigan Estate Planning Council Monthly Meeting Domestic & Offshore Asset Protection	Bay City, MI	Oct 2003
Denver Estate Planning Council Monthly Meeting Offshore Tax Scams	Denver, CO	Sept 2003
E Planners One Day Seminar Domestic & Offshore Asset Protection	Oklahoma City, Ok	Sept 2003
Physicians & Surgeons Monthly Meeting Domestic & Offshore Asset Protection	Pensacola, FL	Aug 2003
Ohio Bar Association Two one day seminars Offshore Asset Protection	Cleveland, OH Columbus, OH	July 2003
Law Firm of Abbott, et. al. Physician Presentation Domestic & Offshore Asset Protection	Detroit, MI	July 2003
University of Denver Graduate Tax Program One Day Seminar Offshore Business and Investment	Denver, CO	June 2003
WealthCounsel Two Day Seminar International Business Transactions & Estate Planning	St. Louis, MO	June 2003
University of Denver Graduate Tax Program One Day Seminar Estate Planning Strategies	Denver, CO	June 2003
University of Denver Graduate Tax Program One Day Seminar Estate & Gift Taxation	Denver, CO	June 2003
Bethlehem Medical Society One Day Seminar Offshore Asset Protection	Bethlehem, PA	May 2003

National Business Institute One Day Seminar Wealth Planning Strategies	Denver, CO	February 2003
National Business Institute One Day Seminar Sophisticated Estate Planning Strategies	Denver, CO	January 2003
Accountant's Education Services Graduate Tax Program Year 2002 Tax Update – Ten one day seminars	10 locations throughout. the U.S.	December 2002
University of Denver Graduate Tax Program One Day Seminar Offshore Business and Investment Taxation	Denver, CO	November 2002
University of Denver Graduate Tax Program One Day Seminar Estate Planning Strategies	Denver, CO	November 2002
University of Denver Graduate Tax Program One Day Seminar Estate & Gift Taxation	Denver, CO	November, 2002
WealthCounsel Seminar How to Market Asset Protection Planning	St. Louis, MO	August 2002
Arkansas Health Care Associates Annual Meeting Offshore & Domestic Asset Protection Planning	Little Rock, AK	November 2002
Oklahoma Neurological Physician Group Monthly Meeting Offshore & Domestic Asset Protection Planning	Okla. City, OK	November 2002
WealthCounsel Two Day Seminar Offshore & Domestic Asset Protection Planning	Las Vegas, NV	August 2002
University of Denver Graduate Tax Program One Day Seminar Offshore Business and Investment Taxation	Denver, CO	June 2002
University of Denver Graduate Tax Program One Day Seminar Estate Planning Strategies	Denver, CO	June 2002
University of Denver Graduate Tax Program One Day Seminar Estate & Gift Taxation	Denver, CO	June 2002

Texas Medical Association One-half day seminar Offshore Asset Protection Planning	Austin, TX	January 2002
National Business Institute One Day Seminar Sophisticated Estate Planning Strategies	Denver, CO	January 2002
University of Denver Graduate Tax Program Year End Planning Considerations	Denver, CO	December 2001
WealthCounsel Study Group Continuing Education Program Asset Protection Planning	St. Louis, MO	November 2001
Offshore & Domestic Asset Protection Planning Engel, Reiman, Lockwood, pc Fourth Annual Affiliate Retreat Business Asset Protection Planning	Boradmoor- Colo. Springs, CO	June 2001
University of Denver Graduate Tax Program Continuing Education Program – Half Day Offshore Asset Protection & Offshore Estate Planning	Denver, CO	June 2001
Professional Education Systems, Inc. Advanced Offshore Practice & Procedure Offshore Tax Scams; Money Laundering	Las Vegas, NV	May 2001
National Network of Estate Planners Two Day Collegium Asset Protection Planning	San Diego, CA	April 2001
Professional Education Systems, Inc. Two Day – Asset Protection Planning Estate Planning & International Tax	Reno, NV	March 2001
Society of Financial Service Professionals National Symposium – Three Day Seminar Estate & Asset Protection Planning	Tucson, AZ	January 2001
National Business Institute One Day Seminar Advanced Estate Planning	Denver, CO	December 2000
Professional Education Systems, Inc. Integrated Estate Planning Business Asset Protection Planning	Denver, CO	November 2000

Professional Education Systems, Inc. Offshore Practice and Procedure International Taxation	Las Vegas, NV	September 2000
Third Annual Affiliate Retreat Engel, Reiman, Lockwood Trust Taxation, Estate Planning	Broadmoor Colo. Springs, CO	July 2000
Professional Education Systems, Inc. Advanced Offshore Practice & Procedure Tax Scams, International Taxation	Las Vegas, NV	May 2000
International Business Companies Annual Convention Offshore Life Insurance Products	Cayman Islands	December 1999
The Offshore Institute 1999 Annual Convention Tax Scams, International Taxation	San Francisco, CA	November 1999
Tallahassee Estate Planning Council Chapter Meeting Offshore Asset Protection Planning McGladrey & Pullen	Tallahassee, FL  Kansas City, MO	October 1999  October 1999
National Annual Educational Conference Offshore Asset Protection Planning Professional Education Systems, Inc. Offshore Practice and Procedure International Taxation, Trust Taxation	Las Vegas, NV.	September 1999
Guardian Life Study Group Two Day Symposium Asset Protection Planning	Cape Cod, MA	July 1999
Second Annual Affiliate Retreat Engel Reiman & Lockwood, pc Trust Taxation	Broadmoor Colo Springs, CO	June 1999
Alabama Bar Association 37 <sup>th</sup> Annual Symposium International and Trust Taxation	Destin, FL	June 1999
Professional Education Systems, Inc. One Day Seminar Asset Protection Planning	San Diego, CA	December 1998
Elder Law Institute – Colorado Chapter Annual Symposium Offshore Asset Protection Planning	Denver, CO	September 1998



Rybka Insurance, School of Life Annual Symposium Offshore Asset Protection Planning	Cuyahoga Falls, OH	September 1998
Professional Education Systems, Inc. Offshore Practice and Procedure International Taxation	Las Vegas, NV	September 1998
First Annual Affiliate Retreat Engel Reiman & Lockwood, pc Trust Taxation	Broadmoor Colo Springs, CO	July 1998
Baker Capital Advisors Annual Symposium Asset Protection Planning	Winston/Salem NC	May 1998
International Association of Financial Planners Annual Symposium – Half Day Asset Protection Planning	Richmond, VA	May 1998
International Association of Financial Planners Annual Symposium Asset Protection Planning	Milwaukee, WI	May 1998
International Association of Financial Planners Chapter Meeting Asset Protection Planning	Austin, TX	February 1998
International Association of Financial Planners Chapter Meeting Asset Protection Planning	San Antonio, TX	February 1998
International Association of Financial Planners Chapter Meeting Asset Protection Planning	Norfolk, VA	January 1998
National Business Institute One Day Seminar Estate and Asset Protection Planning	Denver, CO	December 1997
Colorado Society of Certified Financial Planners Half Day Seminar Asset Protection Planning	Denver, CO	November 1997
International Association of Financial Planners Annual Symposium Asset Protection Planning	Charlotte, NC	November 1997

International Association of Financial Planners Chapter Meeting Asset Protection Planning	San Diego, CA	October 1997
Chartered Life Underwriters/ CFPs Chapter Meeting Offshore Asset Protection Planning	Miami, FL	September 1997
International Association of Financial Planners Chapter Meeting Asset Protection Planning	Oskosh, WI	September 1997
International Association of Financial Planners Full Day Seminar Asset Protection Planning	Des Moines Iowa	September 1997
International Association of Financial Planners Half Day Seminar Estate and Asset Protection Planning	Portland, OR	August 1997
International Association of Financial Planners Chapter Seminar Asset Protection Planning	Philadelphia, PA	November 1997
International Association of Financial Planners Chapter Seminar Asset Protection Planning	Minneapolis, MN	July 1997
International Association of Financial Planners Annual Symposium Asset Protection Planning	Pittsburgh, PA	November 1997
International Associations of Financial Planners Annual Symposium Asset Protection Planning	Pittsburgh, PA	October 1996
It's Your Money Cable Television Offshore Asset Protection Planning	Denver, CO	September, 1995
It's Your Money Cable Television Estate Planning	Denver, CO	September, 1994