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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 Final Four Accounting Firm, two local accounting firms, and managed his own accounting firm.

Quoted In

Mr. Merric has been quoted in

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

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, 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

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 50 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.
- ◆ *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
* Past Designations:	◆ Certified Management Accountant*
◆ Certified Internal Auditor	◆ Accredited Financial Planning Specialist*

Education and Teaching Experience

Mark Merric has the following degrees and teaching experience.

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| ◆ 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.