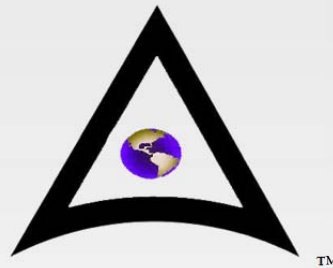


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Merric Law Firm, LLC

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

Qingdao Central Government
Qingdao, China
2011

International Business Companies
Grand Cayman, Cayman Islands
1999

Offshore Institute
San Francisco, CA
1999

WealthCounsel
Las Vegas
2003

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:

Group/Event/ Subject (401)	Location	Date
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	Denver	July 2012

University of Denver
All Day Presentation

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

Shanghai, China June 2011

International Taxation – Export Transactions
2 Hour Presentation

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

Denver, CO

November 2010

All Day Seminar

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

Denver, CO

June 2010

One Day Seminar

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	Denver, CO	July 2009

1 ½ hour presentation

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

Boston, MA Feb 2009

1 hr. program

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	Longmont, CO	April 2008

Discretionary Dynasty Trusts

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	Lakewood, Colorado	July 2007

Discretionary Trusts

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	Little Rock, Arkansas	Jun 2006

Modular Approach to Estate Planning

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	Seattle, WA	Nov 2005

Estate Planning For High Net Worth Clients

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	Denver, CO	Jan. 2005

Estate Planning Tools

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	Columbus/ Cleveland	July 2004

Domestic & Offshore Asset Protection

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

Denver, CO

Jan 2004

Estate & Gift Taxation

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	Denver, CO	June 2003

Offshore Business and Investment

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	Okla. City, OK	November 2002

Monthly Meeting Offshore & Domestic Asset Protection Planning		
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	San Diego, CA	April 2001

Asset Protection Planning

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	Tallahassee, FL	October 1999
McGladrey & Pullen National Annual Educational Conference Offshore Asset Protection Planning	Kansas City, MO	October 1999
Professional Education Systems, Inc. Offshore Practice and Procedure International Taxation, Trust Taxation	Las Vegas, NV.	September 1999
Guardian Life Study Group Two Day Symposium	Cape Cod, MA	July 1999

Asset Protection Planning

Second Annual Affiliate Retreat Engel Reiman & Lockwood, pc Trust Taxation	Broadmoor Colo Springs, CO	June 1999
Alabama Bar Association 37 th 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	Norfolk, VA	January 1998

Asset Protection Planning

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

Denver, CO

September, 1995

Cable Television
Offshore Asset Protection Planning

It's Your Money
Cable Television
Estate Planning

Denver, CO

September, 1994

