

**Council of the Trust and Estate Section of the Colorado Bar Association
Notice of and Agenda for the December 7, 2022, Meeting**

To: Council Members
Trust and Estate Section of the Colorado Bar Association

From: Dylan Metzner
Secretary/Treasurer
1675 Broadway, 26th Floor
Denver, CO 80202
(303) 785-1632
dmetzner@joneskeller.com

Notice of Meeting

The next monthly meeting of the 2022-2023 Council of the Trust and Estate Section of the Colorado Bar Association will be held:

Date and time: **Wednesday, December 7, 2022, 3:15 p.m.**

Place: 1290 Broadway, Suite 1700, Denver, CO 80203 Room West 1
or Call-In/Zoom

<https://cba-cle.zoom.us/j/83843741966?pwd=NXVOTEExdUxuQ0FrV0VXV3ZrU3hVQT09>

Meeting ID: 838 4374 1966

Passcode: 534100

Call-in: 16694449171

Minutes of Previous Meetings & Attachments

1. Minutes of the November 2, 2022 meeting of the Council
2. Executive Council First Year Vacancy Application Packets (Nominee Committee Recommendations for Vote)
 - a. Bridgers, Griffin
 - b. Edwards, Margot
 - c. Schmidt, Chris
3. October 31, 2022 Financial Statements
4. November 30, 2022 Financial Statements
5. Memorandum regarding the November 15, 2022 CBA Real Estate Section Council Meeting
6. Draft Advance Medical Directives Brochure
7. Materials related to Request for grant to support Greater Colorado Law Student Experience

**Trust and Estate Section Council Agenda
December 7, 2022**

In an attempt to adhere to the allotted meeting duration of one (1) hour and thirty (30) minutes, the Chair will exercise his/her prerogative to limit the time for any report or discussion on a topic to ten (10) minutes. This conforms to Robert's Rules of Order.

1. Review/approval of Minutes of the November 2, 2022 meeting of the Council
2. Succession Items re: Council Member Vacancy, Committee Chair; Liaisons and Representative
 - a. Vacancy- Executive Council First Year Member
 - i. Discussion of Nominee Committee Recommendations
 - b. Succession Planning- Legislative Liaison
 - c. Discussion- re Possible Creation of Liaison to ADR Section
3. Chair's Report and Administrative Matters (Molly Zwerdlinger)
4. Secretary/Treasurer's report (Dylan Metzner)
5. Tax Section Liaison (Aaron Burton)
6. Elder Law Section (Patrick Thiessen)
7. Real Estate Section Liaison (Chad Rounds)
8. Family Law Section Liaison (Kim Willoughby)
9. Statutory Revisions Committee (Jonathan Haskell)
10. Legislative Liaison (Steve Brainerd)
11. Legislative Update (Tyler Mounsey)
12. Council Notes (Kristin Dittus)
13. CLE/Estate Planning Retreat (Lauren da Cunha)
14. Orange Book Forms Committee (Rikke Liska)

15. Supreme Court's Rules and Forms Committee (Leia Ursury)
16. Civic and Community Affairs Joint Committee of the Elder Law Section (Sandra Sigler)
17. Equity, Diversity, and Inclusivity Committee (Amber Marchlowska)
18. Probate Trial and Procedures Committee (Marcie McMinimee & Lindsay Andrew)
19. Colorado Estate Planning Handbook (David Johns)
20. Green Book (Josie Faix)
21. Trust & Estate Practice Support Committee (Margrit Parker)
22. The Colorado Lawyer (Emily Bowman & David Kirch)
23. Communications Representative/Ambassador Program (Kayla Nelson)
24. Board of Governors Representative (Jonathan Haskell)
25. Miscellaneous/FYI
 - a. Request for grant to support Greater Colorado Law Student Experience
26. Adjournment

**Council of the Trust and Estate Section of the Colorado Bar Association
Minutes of the November 2, 2022, Meeting**

Council met on Wednesday, November 2, 2022 via audio-conference. The meeting was called to order at approximately 3:18 p.m. by Molly Zwerdinger, Chair.

The following members of Council participated by Zoom/phone or in-person and constituted a quorum:

In attendance were:

Molly Zwerdinger, Chair
Lauren da Cunha, Vice Chair
Dylan Metzner, Secretary/Treasurer
Kelianne Chamberlain (1st year member)
Marianne Luu-Chenn (2nd year member)
Kristin Piñerio (2nd year member)
Lindsey Andrew (1st year member)

Tim Bounds, (Immediate Past Chair)

Also in attendance were:

Emma Baxter, CBA Staff
Kayla Nelson
Gabby Loveday
Leia Ursury
Spencer Corona
Sandra Siegler
Chad Rounds
Jonathan Haskell
Elizabeth Howard
Amber Marchlowska
Rikke Liska
Margrit Parker

1. Review/approval of October 6, 2022 Minutes.

The draft of the October 6, 2022 minutes were approved unanimously.

2. Succession Items re: Council Member Vacancy, Committee Chair, Liaisons and Representatives

a. Vacancy- Executive Council First Year Member.

Dylan Metzner motioned to form Nominating Committee, to consist of Chair (Molly Zwerdinger); Vice Chair (Lauren da Cunha); Secretary/Treasurer (Dylan Metzner) and Immediate Past Chair (Tim Bounds) and the Nominating

Committee to be charged with reviewing applications and making recommendations to Council for a vote at the December meeting to select the applicant to fill the vacancy of First Year Council Membership.

Motion duly seconded and passed unanimously.

b. Succession Planning- Legislative Liaison.

No discussion.

c. Discussion- re Possible Creation of Liaison to ADR Section

No discussion.

3. Chair's Report and Administrative Matters (Molly Zwerdinger)

Discussed either Certificates or plaques for chairs and Executive Council members. Certificates will be issued for all Committee Chairs and plaques will be issued to Executive Council Members and Officers when they term out (or in the case of officers, an officer's last year of consecutive service as an Officer).

4. Secretary/Treasurer's report (Dylan Metzner)

Secretary/Treasurer reported that financials are in good shape and the September 30th balance of \$68,726 is higher than last year's September 30th balance of \$65,535.

Based discussion during October's Executive Council's meeting, Secretary/Treasurer will review the financials from previous years to make a report back to Council as to balances over the past for purposes of potentially establishing setting a minimum amount to keep in the account for unexpected expenses or dips in revenue. Goal is for the report to Council to occur at either the December or the January meeting.

The Sterling Ambler Dinner will occur this evening and we are expecting approximately 36 attendees.

5. Tax Section Liaison (Aaron Burton)

No report.

6. Elder Law Section (Patrick Thiessen)

Sandra Siegler and Kayla Nelson Reported- Elder law retreat will be in Vail at the end of August. A couple of pieces in the Medicaid committee that will be brought up in general discussion due to trouble that is being had with income cap trusts created by agents

acting pursuant to durable power of attorney. Elder Law is working on possible statutory changes to allow agents to create these trusts.

7. Real Estate Section Liaison (Chad Rounds)

Amendment D CBA is supporting.

The Section discussed a District Court case against law firm for unfair debt collection and the question is whether the law firm is a debt collector under the act as well as Denver Ordinance 305 which is part of Denver's 2022 Ballot.

8. Family Law Section Liaison (Kim Willoughby)

No report.

9. Statutory Revisions Committee (Jonathan Haskell)

SRC approved proposed amendment to definition of "Interested Person". Current definition of "Interested Person" in CUTC is constrained by the definition of Qualified Beneficiary. With this constraint the concern, which came from a real world case, is that if a trust amendment removed a beneficiary and that removed beneficiary has concerns about the trust settlor's capacity to execute the amendment then the removed beneficiary is no longer an Interested Person under CUTC. If this happened in a will the removed beneficiary would have standing. The language approved by SRC, without much discussion and no objections, is as follows:

(10) "Interested person" means a qualified beneficiary or other person having a property right in or claim against a trust estate, which right or claim may reasonably and materially be affected by a judicial proceeding pursuant to this code. The term also includes fiduciaries and other persons having authority to act under the terms of the trust. **The meaning as it relates to particular persons may vary from time to time and is determined according to the particular purposes of, and matter involved in, any proceeding.**

Upon motion duly made and seconded, executive council voted unanimously to approve the language that SRC approved.

In addition, during the SRC meeting Steve Brainerd mentioned that the disclosure of fiduciary fees 15-10-602 and 15-12-705 was passed by SRC and Council back in 2015-2016 but it never was passed by LPC. Dylan Metzner and Jonathan Haskell will review this and discuss at the December or January Council Meeting.

10. Legislative Liaison (Steve Brainerd)

No Report.

11. Legislative Update (Tyler Mounsey)

CBA is supporting Amendment D which is part of Colorado's 2022 Ballot.

Not much to report at this point due to the General Assembly's focus on the upcoming election. Tyler encourages communications with him if there are any items that the Section think may be appropriate to bring to the legislature.

Colorado General Assembly SRC is looking for two new non legislative attorneys. If you are interested please reach out to Tyler.

This year is going to be a fiscally lien year.

CBA is supporting Amendment D.

12. Council Notes (Kristin Dittus)

Usual publications for next Council Notes and Kristin will do an article on credit card processing fee that can get passed along to clients.

13. CLE/Estate Planning Retreat (Lauren da Cunha)

Great response to RFP for presenters. Committee planned all of the sessions for the retreat with some follow up work for specific presenters. One more lunch to plan for 2022-2023.

Retreat is in Santa Fe June 8-10th.

14. Orange Book Forms Committee (Rikke Liska)

Still working on beneficiary deed form. Also looking at issue that Elder Law has been talking about regarding changes to "hot power" language in the POA to address the income trust powers for Medicaid purposes.

15. Supreme Court's Rules and Forms Committee (Leia Ursury)

Cleanup issues are getting finalized by the Committee. There is a question regarding the new supportive decision making agreement specifically as to whether if the forms are updated to ask for disclosure of other individuals (such as a request for beneficiaries listed in a beneficiary designation agreement) such updates would open the door for a requirement to provide notice to individuals who do not need notice.

Discussion as to whether fiduciary appointment forms that include disclosure of fees opens the door to arguments that those disclosed fees are approved if the fiduciary is appointed. The Committee is not clear as to whether this is truly an issue that needs to be addressed in the form.

If anyone has a substantive issue with a Form please contact Leia and she will bring that issue to the attention of the Committee.

- 16. Civic and Community Affairs Joint Committee of the Elder Law Section (Sandra Sigler)**
Senior Law Handbook Time. Requesting for Section support this year. Along with everything else printing costs have increased. Increase annual ask from \$2,500 to \$3,000. Hoping to be printing pre-covid level number of books (approximately 5,000 in fees).

Motion duly made and seconded was approved Unanimously. Section will contribute \$3,000 to Committee for Handbook.

Still planning on having a number of events in 2023 in various countries.

Advanced Medical Directive Brochure is finalized and Civic and Community Affairs Joint Committee will be asked for approval by Council at December's meeting.

- 17. Justice Equity Diversity and Inclusivity (formerly known as the Equity, Diversity, and Inclusivity)Committee (Amber Marchlowska)**

LGTBQ Gala table was a success all seats were filled. Committee has another \$500 left in budget for next year's galas and will also begin internal fundraising.

Committee voted to be renamed the Justice Equity Diversity and Inclusivity (JEDI) Committee

DU Sturm is doing CLE series on EDI topics.

Amber will reach out to Elder Law to see if JEDI can be made a joint committee.

- 18. Probate Trial and Procedures Committee (Marcie McMinimee & Lindsay Andrew)**

Holding annual PTPC reception and panel 12/27 4:30-6:30 at University Club.

Justice Gabriel

Magistrate Price

Magistrate Mohammad

Topic- When and to what extent the probate courts retain jurisdiction that may fall outside of probate.

Committee is still discussing the possibility about publishing the Bench Book

- 19. Colorado Estate Planning Handbook (David Johns)**

No report.

- 20. Green Book (Josie Faix)**

No report.

21. Trust & Estate Practice Support Committee (Margrit Parker)

Full officer team. Vice Chair Caroline Young; Treasurer- Suzy Nelson; Secretary- Scott Grayson.

22. The Colorado Lawyer (Emily Bowman & David Kirch)

No report.

23. Communications Representative/Ambassador Program (Kayla Nelson)

Kayla reached out to all the mentors and recent past mentors to see if they were able to commit to attend a TEPS Committee meeting. Reached out to Judge Stewart and Elder law communications representative and DU Career services regarding potential job fair for T&E and Elder Law which would be at DU and at CU as well if CU approves.

24. Board of Governors Representative (Jonathan Haskell)

October 18th Meeting. Ryan Payton is new CBA President and the focus this year is "What do we Know of Each Other". The theme is that members of the Bar should be civil to each other and clients but go further and get to know more about our colleagues and about our respective clients.

If anyone is interested in learning more about the Federal Pro-Se Clinic please contact Jane Andrews (Jane Andrews fpssc@cobar.org).

Board of Governors Long Term Visionary Themes:

- 1) Building community through belonging;
- 2) generating economic, environmental, and social sustainability, and
- 3) cultivating profession wide relevance and reach.

Waterman Fund- Available for anyone struggling that needs financial assistance.

25. Other Business

None

ADJOURNMENT

The meeting was adjourned at 4:27 p.m. The next Council meeting will be held December 7, 2022.

Respectfully submitted

/s/ Dylan Metzner, Secretary

GRIFFIN H. BRIDGERS

8252 S. Tamarac Street
Centennial, CO 80112
(615) 653-3744
griffin.bridgers@gmail.com

BAR ADMISSIONS

Tennessee, 2008; Colorado, 2010

EDUCATION

NEW YORK UNIVERSITY SCHOOL OF LAW, New York, NY
LL.M. in Taxation, May 2009
Unofficial GPA: 3.61

CUMBERLAND SCHOOL OF LAW, SAMFORD UNIVERSITY, Birmingham, AL
J.D., May 2008
GPA: 3.48; class rank 27/159 (top 17%)
Honors: *Cumberland Law Review*, Associate Editor

UNIVERSITY OF MEMPHIS, Memphis, TN
B.B.A., Real Estate, *cum laude*, December 2003
GPA: 3.41

WORK EXPERIENCE

BRIDGERS WEALTH STRATEGIES, LLC, Centennial, CO (Owner, July 2022 – present)
Independent wealth strategist for hire on a contract basis, serving the needs of registered investment advisors and family offices as an in-house subject matter expert on tax and estate planning for ultra-high net worth families.

HUTCHINS & ASSOCIATES LLC, Denver, CO (Associate July 2017 – June 2020; Member July 2020 – June 2022; Of Counsel July 2022 - present)
Attorney specializing in tax, estate planning, business planning, and probate and trust administration for ultra-high net worth families, closely-held family business owners, executives, athletes, and farmers and ranchers

SPENCER FANE LLP (FORMERLY BERENBAUM WEINSHIENK PC), Denver, CO (October 2015 – July 2017)
Associate Attorney specializing in tax, employee benefits and ERISA, executive compensation, estate planning and business planning for high net worth families and closely-held family business owners, probate and trust administration, tax credit financing, and tax-exempt organizations

SHORTRIDGE, FITZKE & HULTQUIST PC, Englewood, CO (September 2009 – October 2015)
Associate Attorney specializing in tax, nonqualified deferred compensation, estate planning and business planning for high net-worth families and closely-held family business owners, probate

and trust administration, and general counsel services for closely-held businesses

SPEAKING ENGAGEMENTS

[UPCOMING] *Business Trends at the Intersection of Estate Planning and Wealth Management*, Tennessee Bankers Association, November 1, 2022

Estate Planning in a Rising Interest Rate Environment, Kitces.com, June 7, 2022

Basis and Income Tax Planning Through Retained Interests, Santa Fe Estate Planning Council, April 20, 2022

Advisor Alert: Important 2021 Developments in the Business Planning Space You Need to Know About Now, Leimberg Information Services, Inc. (LISI), March 2022

Estate Planning for Difficult Assets, FPA Colorado Chapter, October 2021

Estate Planning ABCs: No Longer Just for JDs, FPA Idaho Chapter, February 2021

The Estate Attorney Down the Hall, FPA Puget Sound Chapter, November 2020

Estate Planning in a Financial Advisory Practice, FPA Utah Chapter, November 2020

Inside, Outside, Upside Down: Balancing the Basics of Basis Adjustments, Denver Tax Institute, July 24, 2018

Trust and Estate Tax Update, April 2018 to the Colorado Bar Association Tax Section and February 2018 to the Greater Denver Tax Council

Employee Benefits Risks That Should Be on Your Radar (Co-Presenter), Association of Corporate Counsel – Colorado Chapter, May 2017

FIRPTA Update, Colorado Bar Association Tax Section, February 2017

Presenter of CLE and CPE for: Strafford Publications, MyCPE, and various bar associations

PUBLICATIONS

Are Financial Advisors Turning Away from Referrals? Rethinking the Interaction of Estate Planning and Wealth Management Practices, TRUSTS & ESTATES (April 2021)

Powers of Appointment Primer, Part 2: Taxation of Powers of Appointment, 47 THE COLO. LAWYER 56 (August/September 2018)

Basis Step-Up Planning: A Double-Edged Sword, 32 PROBATE AND PROPERTY 24 (July/August 2018)

Powers of Appointment Primer, Part 1: The Colorado Uniform Powers of Appointment Act, 47 THE COLO. LAWYER 54 (June 2018)

Health and Education in Trust Administration: A More Active Role for Trustees, TRUSTS & ESTATES (February 2018)

Proposed Valuation Regulations May Affect Real Estate Entities, COLO. REAL ESTATE JOURNAL (January 2017)

Multi-State Issues When Appointing Guardians for Minors, 43 THE COLO. LAWYER 11 (November 2014)

TEACHING EXPERIENCE

COLLEGE FOR FINANCIAL PLANNING, Centennial, CO (April 2011 to present)

Adjunct Associate Professor

Courses taught include online modules on Estate Planning and Income Taxation for the CFP Mentor Program, Live Review and Web Review of the Estate Planning module for the CFP Exam Preparation Program, and various estate planning courses for graduate degree programs. Substantive work includes review and revision of written materials for intermediate and advanced estate planning courses for graduate degree programs

PROFESSIONAL INVOLVEMENT

STRAFFORD PUBLICATIONS, INC.

Tax & Accounting Advisory Board

COLORADO BAR ASSOCIATION

Trusts & Estates Section

Taxation Section

AMERICAN BAR ASSOCIATION

Taxation Section – Member

Real Property, Trusts & Estates Section – Member

#7

COMPLETE

Collector: Web Link 1 (Web Link)
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Q1

What position within the section executive council are you applying for?

First-year Council member

Q2

First Name

Griffin

Q3

Last Name

Bridgers

Q4

Pronouns

he/him/his

Q5

Contact Information

Email Address

griffin.bridgers@gmail.com

Phone Number

615-653-3744

Q6

Colorado Supreme Court Registration Number (if applicable)

41970

Q7

Yes

Are you a member of the Colorado Bar Association?

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

While I do not have much name recognition, I am a long-time contributor in the background to the T&E section through articles, CLE, and past participation in the Orange Book Forms subcommittee. But, beyond this, I have a long history of thought leadership on a national level, and I dedicate a lot of time to speaking to other CLE providers, bar associations, estate planning councils, financial planning councils, and even direct to individuals through my YouTube channel and newsletter. As a natural progression of my past local and national contributions, I am interested in expanding my leadership within the T&E section and the legal profession in general. I feel that serving a term on the Executive Council provides a great opportunity for me to give back in this capacity.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

Post-COVID, there is a growing appetite for both community and education in a hybrid setting. While serving in this position, I would bring fresh ideas to the T&E section's efforts to better engage section members wherever they may be, whether inside and outside of Colorado. My passion is education and thought leadership, and my primary goal would be to identify young talent and solicit their contributions through CLE, articles for The Colorado Lawyer and the section newsletter, and even future section leadership. I would also like to continue the section's efforts in providing meaningful guidance around technological competence in estate planning, especially given the proliferation of software for practice management and drafting over the last few years. I am uniquely situated to contribute on the tech side, as I participate in the advisory boards for two estate planning tech startups. I am also uniquely situated to provide career and practice guidance surrounding the intersection of estate planning and wealth management, and I can lead efforts in this position to develop resources for section members in this area.

Q10

Document attachment: (optional)

Bridgers, Griffin - CV.pdf (82.2KB)

Q11

Area(s) of Practice:

Tax, estate planning

Q12

White or Caucasian

Race, Ethnicity, or Origin (choose all that apply)

Q13

Male

Gender Identity

Trust and Estate Section Leadership Application

Q14

Heterosexual

Sexual Orientation

Q15

No

Disability (a physical or mental impairment that substantially limits one or more major life activities)

Q16

Not applicable

Military Service (select all that apply)

Q17

Your full name:

Griffin Bridgers

Q18

Application submission

09/22/2022

Date:

MARGOT SUMMERS EDWARDS

1455 16th Street, Suite 407
Denver, CO 80202
(720) 935-9495
Margot.edwards@jpmorgan.com

EXPERIENCE

J.P. Morgan Private Bank

Managing Director and Wealth Advisor

Denver, Colorado
January 2022 to Present

- Meet with clients and prospects to identify and discuss their tax and personal planning goals. Discuss estate planning techniques and sophisticated wealth transfer options to assist with meeting those goals.

Holland & Hart LLP

Partner (as of January 1, 2015)

Boulder and Denver, Colorado
September 2007 to December 2021

- Wealth Transfer Planning: Design and implement sophisticated wealth transfer plans, customized to meet clients' tax and personal goals. Utilize planning techniques such as sales to intentionally defective irrevocable trusts, posturing assets for discounts, GRATs, and charitable structures. Focus particularly on working with entrepreneurs and pre-liquidity planning.
- Estate and Trust Administration: Represent fiduciaries and beneficiaries in connection with estate and trust administration, including complex trust administration for multiple generations of beneficiaries.
- Management Committee: Elected member of the five partner Holland & Hart Management Committee, which oversees the strategic direction of the firm, from 2017 to 2021.
- Other Firm Contributions: Founding member of Women's Forum, Member of Diversity Committee, Former Member of Professional Development Committee.

University of Colorado

Adjunct Professor

Boulder, CO
December 2016-May 2017

- Developed curriculum and taught Wills & Trusts.

Colorado Supreme Court

Law Clerk for Justice Gregory J. Hobbs, Jr.

Denver, CO
September 2006 to September 2007

- Prepared memos outlining recommended disposition of petitions for certiorari.
- Researched and drafted Supreme Court opinions.

EDUCATION

University of Colorado School of Law

Juris Doctor, 2006

Order of the Coif

Journal on Communications and High Technology Law, Associate Editor

St. John Fisher College

Bachelor of Science, Political Science, 2001

Summa Cum Laude

RECOGNITION

Chambers High Net Worth Guide, Private Wealth Law, 2020-2022

The Best Lawyers in America©, Tax Law, 2017-2022; Trusts & Estates Law, 2018-2022; Tax Lawyer of the Year, Boulder, 2022

5280 Magazine Top Lawyers, Estate Planning, 2021

Colorado Super Lawyers® Rising Stars, 2012

PUBLICATIONS AND SPEAKING ENGAGEMENTS

“Fiduciary Duty and Selecting Trust Situs, What Should a Trustee Consider?” *The Colorado Lawyer*, Co-Author, October 2021

“Charitable Trusts,” *CBA CLE Understanding and Using Trusts Series*, Co-Presenter, March 2021

“Tax Matters Related to Settlement Agreements,” *Holland & Hart Fiduciary Solutions Group Symposium*, October 2019

“Current Tax Considerations for Fiduciaries and their Advisors,” *Holland & Hart Fiduciary Solutions Group Symposium*, November 2017

“Planning for the Family Business,” *Colorado Bar Association Estate Planning Retreat*, Co-Presenter, June 2017

“Intersections between Marital Agreements and Estate Planning,” *Holland & Hart Fiduciary Solutions Group Symposium*, November 2016

“Planning with Charitable Trusts,” *Colorado Bar Association Estate Planning Retreat*, Co-Presenter, June 2011

“Does Your Charitable Trust Qualify?” *Colorado Planned Giving Roundtable Technical Series*, Co-Presenter, October 2010

“Charitable Trusts,” *Colorado Bar Association Publication*, Co-Author, 2011, Updated 2017

“Holland & Hart Fiduciary Law Blog, www.fiduciarylawblog.com,” published blog topics include:

- “Continuing Urgency Related to Gift and Estate Tax Planning” February 22, 2021
- “Will the Current Estate and Gift Tax Exemptions be Reduced before 2025?” June 4, 2019
- “United States Supreme Court to Consider Whether States May Tax Trusts based on Residence of Beneficiary” February 25, 2019
- “Clarification Regarding Deduction of Expenses by Trusts and Estates” July 30, 2018
- “Asset Protection Statute Cannot Limit Jurisdiction of Another State” April 9, 2018
- “IRS Can Reopen Estate Tax Return to Determine Available DSUE Upon Death of Second Spouse” November 20, 2017
- “Proposed Estate Tax Legislation” March 27, 2017
- “Nuances of Estate Tax Lien Priority” November 7, 2016
- “High Net Worth Taxpayers and Their Advisors Should Act Now to Address the Proposed Regulations to Section 2704,” Co-Author, August 12, 2016
- “New Reporting Required of Estate Fiduciaries by IRS” April 11, 2016

PROFESSIONAL AFFILIATIONS

Rocky Mountain Estate Planning Council
American Bar Association, Tax Section
Colorado Bar Association, Trust and Estate Section
Colorado Women's Bar Association
Boulder County Bar Association

#11

COMPLETE

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Page 1

Q1

What position within the section executive council are you applying for?

First Year Council Member

Q2

First Name

Margot

Q3

Last Name

Edwards

Q4

Pronouns

She/Her

Q5

Contact Information

Email Address

margot.edwards@jpmorgan.com

Phone Number

720-935-9495

Q6

Colorado Supreme Court Registration Number (if applicable)

37929

Q7

Yes

Are you a member of the Colorado Bar Association?

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

I am truly excited about the potential to serve as a member of the Executive Council. I served in several firm leadership roles during my fourteen-year tenure as a trusts and estates attorney at Holland & Hart in Boulder and Denver. My most notable role was my service as a member of the Management Committee, which oversees the firm's strategic direction. As a part of the firm leadership, I was fortunate to have had a number of successes with developing and implementing new strategies, in collaboration with the rest of the leadership team. In the process, I cultivated deep relationships with my peers at the firm. Each of my leadership roles has been deeply rewarding, and a highlight of my career thus far.

Earlier this year, I joined J.P. Morgan Private Bank as a Managing Director and Wealth Advisor. At both Holland & Hart and in my new role at J.P. Morgan I have had the pleasure to work with numerous highly skilled professionals in the trusts and estates field across the country, including other attorneys, accountants, family office providers, and financial advisors. In my current role, I regularly collaborate with trusts and estates attorneys with whom J.P. Morgan shares clients, primarily in Colorado but also in other jurisdictions. I meet via zoom at least weekly with the other Wealth Advisors (trusts and estates attorneys in markets across the country) at J.P. Morgan to discuss developments in the law, issues, and solutions. This experience affords me the opportunity to have perspective on what is happening in our field in other jurisdictions. As a result, I feel that I have knowledge and experience that would add to the discussion of various issues relevant to the Trusts and Estates Section.

While in private practice, I focused my leadership activities within my firm. Following joining J.P. Morgan in January, I am excited to explore new leadership opportunities. In my current role I now have the time to fully devote myself to serving the Trusts and Estates Section. I very much appreciate being considered for this position.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

If selected to serve in this position, I would like to help move the Section's priorities forward in service to its members all over the state. Specifically, I would enjoy working with the standing and working committees on their projects, as well as connecting with local and specialty bars to collaborate on shared goals. I am also excited to participate in strategic planning around future trends and legislative changes. This is an area where I feel I can contribute based on my broad view of the practice across the country.

I would also like to contribute in a meaningful way to the Section's commitment to diversity and inclusion. While at Holland & Hart, I was a founding member of the firm's Women's Forum, which has grown into a strong group that not only supports women in their career paths, but also makes policy recommendations to the firm's management. In addition, I served as the liaison between the Management Committee and the firm's Diversity, Equity and Inclusion Committee. I had the opportunity to learn from my diverse colleagues, to develop new strategies, and to advocate for change at the firm in furtherance of our diversity goals. Diversity and inclusion are very important to me and I would like to remain strongly engaged in this area through the Section.

Finally, I would like to work with the other members of the Executive Council on strategies for keeping the Section vibrant going forward. While we are always evolving, following the pandemic there has been significant change in the way that young professionals in particular view their career and law practice. I am interested in how we continue to make the Section appealing to young lawyers and maintain relevance for their long-term career paths.

Q10

Document attachment: (optional)

2022 Resume.pdf (387.4KB)

Q11

Area(s) of Practice:

Estate Planning and Tax

Q12

White or Caucasian

Race, Ethnicity, or Origin (choose all that apply)

Q13

Female

Gender Identity

Q14

Heterosexual

Sexual Orientation

Q15

No

Disability (a physical or mental impairment that substantially limits one or more major life activities)

Q16

Not applicable

Military Service (select all that apply)

Q17

Your full name:

Margot Edwards

Q18

Application submission

10/02/2022

Date:

Christopher D. Schmidt
Fort Collins, CO 80525
(970) 556-1426 | chris@schmidtlawpllc.com

EXPERIENCE

Coan, Payton & Payne, LLC, Fort Collins, CO

Senior Associate Attorney, November 2020 – Present

Draft estate planning documents, including irrevocable and revocable trusts, wills, and ancillary estate plan documents; Work with client advisors on tax planning and business planning; Assist clients with business transactions including mergers and acquisitions, formations, dissolutions, conversions, as well as a variety of other business transactions; Prepare and review real estate transaction documents including leases, PSAs, easements, deeds of trust, loan documents; Research business/corporate, estate planning, tax, and real estate issues; Participated in business development.

K·Coe Isom, Loveland, CO

Transactional Tax Attorney/Corporate Counsel, September 2018 – October 2020

Analyzed and interpreted estate planning documents including, revocable trusts, IDITs, SLATs, and charitable trusts; Reviewed and drafted organizational and entity documents for limited liability companies, partnerships, and corporations; Performed research on estate planning, tax planning, business succession, and business transactions and communicated the findings of the same to both internal and external clients in both oral and written communications; Developed business succession and estate plans and worked with clients and their advisors in executing the same; Provided representation in Tax Court proceedings and IRS examinations; and Analyzed and presented on complex technical tax projects.

Schmidt Law, PLLC, Rigby, ID

Attorney, November 2014 – August 2018

Drafted trust and estate planning documents; Assisted clients in probate; performed legal research; Negotiated business contracts and residential leases; Prepared business organizational documents; Advised clients operating federally regulated businesses; Researched and drafted memoranda; Represented clients in family law matters; Prepared demand letters; Represented clients in both criminal and civil proceedings; Prepared motions; Responsible for client development and retention.

EDUCATION

University of Florida Levin College of Law, Gainesville, FL

Master of Laws in Taxation, May 2018

Graduate Thesis: *Tax Consequences to Buyers and Sellers of S Corporations*

The University of South Dakota School of Law, Vermillion, SD

Juris Doctor, May 2014

Colorado State University, Fort Collins, CO

Master of Science in Construction Management, May 2008

Graduate Thesis: *Performance Evaluation of Various Hot Mixed Asphalt Rehabilitation Strategies*
Helwan University International Project Management Study Participant

Brigham Young University – Idaho, Rexburg, ID

Bachelor of Science in Business Finance, August 2005

Business Department Scholarship Recipient

ACTIVITIES, ACHIEVEMENTS, AND PERSONAL INTERESTS

Member Colorado Bar Association, Taxation Section (Executive Counsel 2020), Chair Northern Colorado Chapter of the J. Reuben Clark Law Society; Executive Secretary for the International Board of the J. Reuben Clark International Law Society; Kentucky Colonel; Eagle Scout; Interests include fly fishing, traveling, and cooking.

BAR ADMISSIONS

Colorado (2014); Utah (2015); Idaho (2016)

#9

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, September 28, 2022 12:46:37 PM
Last Modified: Wednesday, September 28, 2022 12:59:45 PM
Time Spent: 00:13:07
IP Address: 38.32.94.251

Page 1

Q1

What position within the section executive council are you applying for?

First Year Council Member

Q2

First Name

Chris

Q3

Last Name

Schmidt

Q4

Pronouns

he/him

Q5

Contact Information

Email Address

cschmidt@cp2law.com

Phone Number

(970) 225-6700

Q6

Colorado Supreme Court Registration Number (if applicable)

47886

Q7

Yes

Are you a member of the Colorado Bar Association?

Q8

Please describe your interest in the section leadership position. (please limit your response to no more than 500 words)

My current practice includes estate planning, business succession planning, and business transactions and I would like make a positive impact to the estate planning community in within the state. I am also currently serving on the Tax Section Executive Council. My involvement with the Estate Planning Council may provide me more opportunities to expand the educational opportunities involving tax and estate planning issues. Lastly, I am located in Northern Colorado so my involvement with the Section would provide opportunities to bring more members from Northern Colorado into the Section.

Q9

What would you like to accomplish while serving in this position? (please limit your response to no more than 500 words)

I would like to expand outreach into Northern Colorado; potentially participate in Orange Book updates; provide educational opportunities; and act as an unofficial liaison to the Tax Section.

Q10

Document attachment: (optional)

2022.7.Schmidt Resume.pdf (91.7KB)

Q11

Area(s) of Practice:

Estate Planning; Business Succession; Business Transactions; Tax; Real Estate Transactions

Q12

White or Caucasian

Race, Ethnicity, or Origin (choose all that apply)

Q13

Male

Gender Identity

Q14

Heterosexual

Sexual Orientation

Q15

No

Disability (a physical or mental impairment that substantially limits one or more major life activities)

Trust and Estate Section Leadership Application

Q16

Not applicable

Military Service (select all that apply)

Q17

Your full name:

Christopher Don Schmidt

Q18

Application submission

09/28/2022

Date:

Colorado Bar Association
Trust & Estate
 For the Four Months Ending October 31, 2022

		October	YTD	Budget	Variance	%	Last FY
Beginning balance	01-3160-31600		\$43,092.16		\$43,092.16	0%	\$38,466.81
Trust & Estate Section							
Revenue							
Dues Income Section	01-4050-31600	2,490.00	31,455.00		31,455.00	0%	32,205.00
Registration Income	01-4501-31600	<u>2,280.00</u>	<u>2,280.00</u>		<u>2,280.00</u>	<u>0%</u>	
Total Revenue Trust & Estate Sect		4,770.00	33,735.00		33,735.00	0%	32,205.00
Expenses							
Other Expense	01-5000-31600		(1,000.00)		(1,000.00)	0%	
Meals (Not travel related)	01-5491-31600					0%	(182.86)
Administration Fee	01-5494-31600	(1,110.38)	(4,441.52)		(4,441.52)	0%	(4,311.84)
Grants/Contributions	01-5500-31600	<u>(2,250.00)</u>	<u>(5,750.00)</u>		<u>(5,750.00)</u>	<u>0%</u>	
Total Expenses Trust & Estate Sec		(3,360.38)	(11,191.52)		(11,191.52)	0%	(4,494.70)
Statutory Revisions Committee							
Revenue							
Rev. Elderlaw Joint Task Force							
Rev. Uniform POA Act							
Rev. Uniform Trust Code							
Expenses							
Exp. Elderlaw Joint Task Force							
Exp. Uniform POA Act							
Exp. Uniform Trust Code							
CLE							
Revenue							
Revenue Joint CLE							
Revenue CLE Retreat							
Revenue CLE Section Only							

Colorado Bar Association
Trust & Estate
 For the Four Months Ending October 31, 2022

	October	YTD	Budget	Variance	%	Last FY
Expenses						
Expenses Joint CLE						
Expenses CLE Retreat						
Expenses CLE Section Only						
Council Notes						
Revenue						
Expenses						
Community & Civic Affairs						
Revenue						
Contributions 01-4500-31613		\$3,500.00		\$3,500.00	0%	
Total Revenue Community & Civic		3,500.00		3,500.00	0%	
Expenses						
Rules & Forms Committee						
Revenue						
Expenses						
Orange Book Forms						
Revenue						
Expenses						
Local Liaison						
Revenue						
Expenses						
Uniform Trust Code						
Revenue						
Expenses						
Transfer Deposits						

Colorado Bar Association
Trust & Estate
 For the Four Months Ending October 31, 2022

	<u>October</u>	<u>YTD</u>	<u>Budget</u>	<u>Variance</u>	<u>%</u>	<u>Last FY</u>
Revenue						
Expenses						
Admin. Chair						
Revenue						
Expenses						
Estate Planning Handbook						
Revenue						
Expenses						
Admin Council Dinner						
Revenue						
Expenses						
Legislative Liaison						
Revenue						
Expenses						
Internet Editor						
Revenue						
Expenses						
Technology Committee						
Revenue						
Expenses						
Real Estate Liaison						
Revenue						
Expenses						
Green Book						
Revenue						

Colorado Bar Association
Trust & Estate
 For the Four Months Ending October 31, 2022

		October	YTD	Budget	Variance	%	Last FY
Expenses							
The Colorado Lawyer							
Revenue							
Expenses							
T&E Diversity Committee							
Revenue							
Misc Income	01-4299-31628		\$1,000.00		\$1,000.00	0%	
Total Revenue Diversity Committe			1,000.00		1,000.00	0%	
Expenses							
Judicial Liaison							
Revenue							
Expenses							
Member Vouchers							
Expenses							
T&E Young Lawyer Society							
Revenue							
Expenses							
Beginning Balance	01-3160-31600		43,092.16		43,092.16	0%	38,466.81
Total Revenue All Sources	01-4???-316??	4,770.00	38,235.00		38,235.00	0%	32,205.00
Total Expense All Sources	01-5???-316??	(3,360.38)	(11,191.52)		(11,191.52)	0%	(4,494.70)
Ending Balance		1,409.62	70,135.64		70,135.64	0%	66,177.11

Colorado Bar Association
Trust & Estate
For the Five Months Ending November 30, 2022

		November	YTD	Budget	Variance	%	Last FY
Beginning balance	01-3160-31600		\$43,092.16		\$43,092.16	0%	\$38,466.81
Trust & Estate Section							
Revenue							
Dues Income Section	01-4050-31600	450.00	31,905.00		31,905.00	0%	32,385.00
Registration Income	01-4501-31600		2,280.00		2,280.00	0%	
Total Revenue Trust & Estate Sect		450.00	34,185.00		34,185.00	0%	32,385.00
Expenses							
Other Expense	01-5000-31600		(1,000.00)		(1,000.00)	0%	
Meals (Not travel related)	01-5491-31600	(2,635.64)	(2,635.64)		(2,635.64)	0%	(5,103.70)
Administration Fee	01-5494-31600	(1,110.38)	(5,551.90)		(5,551.90)	0%	(5,389.80)
Grants/Contributions	01-5500-31600		(5,750.00)		(5,750.00)	0%	
Total Expenses Trust & Estate Sec		(3,746.02)	(14,937.54)		(14,937.54)	0%	(10,493.50)
Statutory Revisions Committee							
Revenue							
Rev. Elderlaw Joint Task Force							
Rev. Uniform POA Act							
Rev. Uniform Trust Code							
Expenses							
Exp. Elderlaw Joint Task Force							
Exp. Uniform POA Act							
Exp. Uniform Trust Code							
CLE							
Revenue							
Revenue Joint CLE							
Revenue CLE Retreat							
Revenue CLE Section Only							

Colorado Bar Association
Trust & Estate
 For the Five Months Ending November 30, 2022

	November	YTD	Budget	Variance	%	Last FY
Expenses						
Expenses Joint CLE						
Expenses CLE Retreat						
Expenses CLE Section Only						
Council Notes						
Revenue						
Expenses						
Community & Civic Affairs						
Revenue						
Contributions 01-4500-31613		\$3,500.00		\$3,500.00	0%	
Total Revenue Community & Civic		3,500.00		3,500.00	0%	
Expenses						
Rules & Forms Committee						
Revenue						
Expenses						
Orange Book Forms						
Revenue						
Expenses						
Local Liaison						
Revenue						
Expenses						
Uniform Trust Code						
Revenue						
Expenses						
Transfer Deposits						

Colorado Bar Association
Trust & Estate
 For the Five Months Ending November 30, 2022

	November	YTD	Budget	Variance	%	Last FY
Revenue						
Expenses						
Admin. Chair						
Revenue						
Expenses						
Estate Planning Handbook						
Revenue						
Expenses						
Admin Council Dinner						
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Expenses						
Legislative Liaison						
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Expenses						
Internet Editor						
Revenue						
Expenses						
Technology Committee						
Revenue						
Expenses						
Real Estate Liaison						
Revenue						
Expenses						
Green Book						
Revenue						

Colorado Bar Association
Trust & Estate
For the Five Months Ending November 30, 2022

		November	YTD	Budget	Variance	%	Last FY
Expenses							
The Colorado Lawyer							
Revenue							
Expenses							
T&E Diversity Committee							
Revenue							
Misc Income	01-4299-31628		\$1,000.00		\$1,000.00	0%	
Total Revenue Diversity Committe			1,000.00		1,000.00	0%	
Expenses							
Judicial Liaison							
Revenue							
Expenses							
Member Vouchers							
Expenses							
T&E Young Lawyer Society							
Revenue							
Expenses							
Beginning Balance	01-3160-31600		43,092.16		43,092.16	0%	38,466.81
Total Revenue All Sources	01-4???-316??	450.00	38,685.00		38,685.00	0%	32,385.00
Total Expense All Sources	01-5???-316??	(3,746.02)	(14,937.54)		(14,937.54)	0%	(10,493.50)
Ending Balance		(3,296.02)	66,839.62		66,839.62	0%	60,358.31

KIRCH ROUNDS BOWMAN & DEFFENBAUGH PC
MEMORANDUM

TO: CBA Council of the Trust and Estate Section

FROM: Chad Rounds

RE: Summary of 11/15/22 CBA Real Estate Section Council Meeting

DATE: 11/15/22

I attended the CBA Real Estate Section Council ("RESC") meeting on 11/15/22 by Zoom. The following is my report on matters addressed which the CBA Trust and Estate Section Council ("TESC") might find of interest:

Tyler Mounsey gave the RESC a recap of the effect of the November election on Colorado's 2023 state legislature.

Federal targeting orders have been issued during the last 3 to 4 years in an attempt to combat criminal financial transactions. Title companies in the targeted areas are required to report to the Federal government residential real estate transactions purchased with a certain amount of cash. None of these orders currently cover Colorado.

A realty company has tried to increase listings throughout the country by giving "free" money to potential sellers of real estate in exchange for a promise to list with the company within forty years. The company files liens on the subject properties to protect its interests. The Colorado Association of Realtors plans to run a state bill to stop this practice in Colorado.

In general, medical professionals will attempt to locate as many interested persons as practicable. Often this includes parents, children, grandchildren, and close friends.

In order for a proxy decision maker to have authority to make medical decisions, the patient's attending physician must determine that the patient lacks the ability to provide informed consent to or refusal of medical treatment. Medical professionals must try to tell the patient that he or she lacks the ability to provide informed consent and that a close relative or friend will be selected to make medical decisions for them.

Frequently Asked Questions

Where should I store my advance directives?

You should keep the directives somewhere that is easily accessible and you should inform your loved ones where to find them. It is not a good idea to place the documents in a safe deposit box at a bank, as on weekends, holidays, and nights, the documents would not be available for use.

Should I talk with my family and friends about my documents?

Yes. When it comes to end of life and medical treatment issues, communication with family members and close friends is the key to ensuring your wishes are followed. Take the time to discuss these issues with your family, close friends, and medical professionals so that they understand your values. The documents do not cover every possible scenario.

How do I convey my values in my advance directives?

Your advance medical directive(s) should include statements about your values and any religious beliefs that would either prohibit or require certain types of medical care.

How do I inform my doctors and other medical professionals about my documents?

You should provide either a physical or an electronic copy of your documents to your primary care doctors and specialists. Take the documents along to your next visit or upload the documents to the medical records portal used by your health care providers.

I just moved to a different state.

Are my advance directives still valid?

If your advance medical directives comply with the state law where the directive were executed, they will likely be recognized and honored in all other states. If you have any questions about whether the directives are valid, consult an attorney.

What if I spend part of the year in another state?

If you spend a significant amount of time in more than one state, such as having a vacation or winter home in another state, you should execute documents in both states in case there are different requirements. It is very important to make sure all your declarations are consistent to avoid any confusion or disputes.

What do I do if I change or revoke my advance directives?

If you revoke or amend any of your advance directives, it is very important that you provide your doctor, family, and anyone else with the most current versions so they are aware of your wishes.

This brochure is published as a public service by the Colorado Bar Association and was authored and is reviewed and updated as needed by the Civic and Community Affairs Committee, a Subcommittee of the Trusts and Estates Section. Its purpose is to provide general information about the topic contained herein, which is a common legal issue that may come up in estate planning, probate, and/or elder law cases. The information in this brochure is current as of October 2022. You should ensure that there have not been any changes in the law that may affect your matter, which may require consulting with an attorney.

Advance Medical Directives

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Colorado Bar Association

Every adult has the legal right to consent to or refuse medical treatment. Advance medical directives are legal documents that state your wishes about your medical care when you are not able to communicate yourself.

In Colorado there are two common advance medical directives:

- A Medical/Health Care Power of Attorney
- A Declaration as to Medical or Surgical Treatment (sometimes called a “living will”)

An advance medical directive does not take away your right to make medical decisions if you are able to do so. It allows your beliefs and decisions to be carried out even when you cannot communicate them.

If you become incapacitated and you do not have any advance medical directives, your loved ones may have to go to court and pursue a guardianship to have the authority to make medical decisions for you.

While you are encouraged to work with an attorney to execute advance medical directives, forms are available at most office supply stores or by searching the internet. If you choose to use a form, make sure it is a Colorado form as the requirements for advance medical directives are specific to each state.

Medical Durable Power of Attorney

A Medical Durable Power of Attorney identifies the person who will make medical decisions for you when you cannot make them for yourself. This person is known as the “agent,” and they can make any medical decisions you could make for yourself, if you were able to do so.

Your medical power of attorney may grant your agent very broad authority or limit their authority. The document may include directions and guidance as to your wishes and beliefs. You may name alternate or successor agents. A medical power of attorney can be revoked at any time.

A medical power of attorney should include a statement giving medical professionals permission to release information to your agent even before it is

determined you cannot make decisions for yourself. This provision allows the agent to communicate with the medical professionals to determine whether you are incapacitated.

Declaration as to Medical or Surgical Treatment

In Colorado, individuals may execute a “Declaration as to Medical or Surgical Treatment,” sometimes referred to as a “Living Will.” This Declaration covers the type of life-sustaining procedures you want when you have a terminal condition or are in a persistent vegetative state. In these very limited circumstances, statements you make in a properly executed Declaration as to Medical or Surgical Treatment govern your treating physician’s course of action regarding artificial nutrition, artificial hydration, and the administration, removal, or refusal of life-sustaining procedures.

Under Colorado law, a “life-sustaining procedure” is any medical procedure that only serves to prolong the dying process, including CPR, defibrillation, medications, and surgery.

A Declaration as to Medical or Surgical Treatment may also include declarations regarding your wishes as to your treatment if you are in a persistent vegetative state.

Regardless of your decision to accept or reject life-sustaining treatment, medical professionals will continue to provide all necessary treatment to alleviate pain and suffering.

A Declaration as to Medical or Surgical Treatment may be revoked or amended at any time.

Other common documents and situations CPR Orders/Do not Resuscitate Orders

CPR treatments are medical procedures that attempt to restore cardiac function or support breathing, including chest compressions, electric shocks, and breathing tubes. You must get a CPR directive from your doctor’s office or the Colorado Department of

Health, and your doctor must sign it after a consultation. If you have a CPR directive, you should place it prominently in your home (on the front door or refrigerator) so that emergency medical personnel can find it easily and carry out your wishes. In addition, you may receive an id bracelet, that indicates you do not want CPR administered.

Disposition of Last Remains Declarations

You have the right and power to direct the disposition of your last remains. Colorado laws provides protection from individuals who may try to impose their views over your stated wishes.

The declaration may cover disposition (cremation, burial, entombment) and ceremonial instructions, and must be signed and dated by you. If you do not make a declaration, your Personal Representative, spouse, designated beneficiary, adult children, parents, guardian, conservator, majority of adult siblings, can make the decision for you. If none of the above individuals are available, then any person willing to pay gets to decide for you.

Organ and Tissue Donation Declarations

You may make a declaration regarding organ and tissue donation in a stand-alone document, Declaration as to Medical or Surgical Treatment, or on your driver’s license. You may give specific direction as to who should benefit from the donation and may even give certain individuals, such as family members a preference. If you do not make a declaration, your agent, spouse, adult children, parents, adult siblings, adult grandchildren, grandparents, caregiver, or your guardian, if applicable gets to decide to make an organ and/or tissue donation.

Proxy Decision Maker for Medical Treatment

If you do not make any advance medical directives, Colorado law allows health care providers to rely on a proxy decision maker chosen by “interested persons” to make decisions for an incapacitated patient.

Greater Colorado Law Student Experience

Greater Colorado Law Student Experience is an immersive summer program for Colorado Law and Denver Law students designed to introduce students to the life and legal practice in Colorado's rural communities. While completing a judicial externship is a part of this program, this program is much more than a typical judicial externship.

Created with developing a sense of community and belonging in mind, this program provides law students with the experience of living and working a Greater Colorado community. Students will get an opportunity to meet and work with local community organizations to understand the community through a wider lens and network with attorneys and judges through the local bar associations to explore career opportunities. What are the strengths, challenges, and resources of the community in this region? What opportunities are possible in the legal profession? This program will give students an opportunity to explore these questions.

PROGRAM DATE

June 5 - July 28, 2023 (8 Weeks)

LOCATION

- Northern Colorado (8th, 19th, and 13th JD)
- Pueblo (4th Judicial District)
- Leadville (tentative)
- Glenwood Springs (tentative)

COST

\$3,400 stipend provided to each participating student to cover the cost of on-campus housing and living expenses

WHO WILL BE SELECTED

10 participating law students from Colorado Law and Denver Law

CONTACT

Northern Colorado: Claire Havelda, Chavelda@bhfs.com

Pueblo: Kyle Aber, aberk@pueblocounty.us

Leadville and Glenwood Springs: Sumi Lee, sumi.lee@judicial.state.co.us

WHAT YOUR DAYS WILL LOOK LIKE:

Monday - Wednesday

Students will spend three days a week working as a judicial extern with an assigned judge in the respective district.

Thursday

Students will spend each Thursday with a designated community organization in the area. Purpose of community days is to plant a seed for future professional opportunities in each region and to develop meaningful experiences that define what it means to be a meaningful contributor to the community.

Friday

Fridays are for networking and professional relationship building opportunities with local bar associations and attorneys.

Partners (in formation):



COLORADO LAW
UNIVERSITY OF COLORADO BOULDER



13th Judicial
District Bar
Association



Weld
County Bar
Association

June 8, 2022

Colorado Bar Association Foundation
Mr. Loren Brown and Ms. Elizabeth Akalin

Via Email: lorenbrown@colo-law.com and eakalin@cobar.org

Dear Mr. Brown and Ms. Akalin,

I am writing to you in support of the Greater Colorado Law Student Experience and their grant application for funding for the summer of 2023.

When Judge Shamis and Sumi Lee approached our Career Development Office about the Greater Colorado Law Student Experience for the summer of 2022, we listened eagerly. As the summer's plans unfolded and they shared their enthusiasm for growing a scalable program that would expose law students to practicing outside of the Denver/Boulder area and that would help to serve the communities in which they would spend their summer, we were eager to make the program available to our students.

We are aware of the "legal deserts" growing in Greater Colorado and rural areas of many states. Unfortunately, as employment opportunities on the Front Range have remained strong over the last several years, it has become more difficult to attract recent graduates to opportunities available in Greater Colorado. Over the last three years, 90% of our graduates who have remained in Colorado have remained in the Denver metro area.

The Greater Colorado Law Student Experience allows 1L and 2L law students an opportunity to experience what living and working in Greater Colorado entails. The summer experience allows them to build networks outside the Front Range, to serve those communities, and to envision themselves as part of those communities.

The program cannot grow without financial support. Efforts to attract students and graduates to Greater Colorado are impacted by the opportunities available on the Front Range and the challenging housing markets found in many parts of Greater Colorado. Grant funding through the Colorado Bar Foundation can provide participating students with funding for housing and other living expenses while spending time in these communities.

Each Colorado Law student participating in future programs is eligible for a Public Service Summer Fellowship through the law school. While that certainly helps students to defray the costs of their summer experience, that alone may not be enough to pull them away from similar opportunities on the Front Range. Coupled with a grant from the Colorado Bar Association Foundation, the program has a real shot at making a difference in these underserved communities and in helping to attract more attorneys to the opportunities in Greater Colorado.

Please feel free to reach out if you have questions about this year's pilot program or the University of Colorado Law School's commitment to participating in the future. We hope that we can count on the Foundation's support of this important program.

Very truly yours,



Lolita

[Lolita Buckner Inniss, JD, LL.M., PhD](#)
Dean and Provost's Professor of Law
University of Colorado Law School
lawdean@colorado.edu



Wolf Law Building : 401 UCB
2450 Kittredge Loop Road
Boulder, CO 80309



UNIVERSITY of
DENVER

STURM COLLEGE OF LAW

Legal Externship Program

June 2, 2022

To Loren Brown and Elizabeth Akalin:

Please consider this a letter of support for a grant application regarding the Greater Colorado Law Student Experience submitted to the Colorado Bar Foundation by Sumi Lee, Head of Judicial Diversity Outreach in the State Court Administrator's Office of the Colorado Judicial Department.

At Denver Law, we are delighted about the possible expansion of this program, which involves both adding additional rural districts to host students and increasing the number of students who can participate in the program. This program has been a value add to Denver Law's rich and robust experiential learning options in summer 2022. I serve as the externship director and annually, we host between 230 and 275 students to work for credit over the summer semester. The number of students within this group who choose to work for credit in rural Colorado, however, is incredibly small. The reality is that students need incentives and intentional efforts to think about opportunities beyond metro Denver. Students are often overwhelmed with the law school curriculum and inundated with employers who are located geographically close to the school. Without intentional engagement, it is far easier for students to select experiential learning options that are the easiest to access and/or that they identify later in the cycle, once they are able to manage their schooling more effectively. With that said, many students want judicial experiences and recognize the value of developing meaningful relationships with members of a courthouse and the region. The Greater Colorado Law Student Experience program packages summer experiential learning so easily for students, creating an ideal setting for them to not just engage with a judge but also understand the broader implications of the legal system, become exposed to practicing in a rural area, and recognize the access to justice needs in such a region.

The stipend for participating in the program is crucial. It offers a critical incentive. Far more offices are paying their externs now. Rather than 20 percent of externships being paid, recent semesters show over 35 percent of students are paid, primarily in the private sector. While it is positive to see increased numbers of students receiving pay, given how frequently students struggle with significant debt, it becomes more difficult for students to select an unpaid option, let alone an unpaid option that might require financing new housing, paying double rents, and/or increased costs associated with travel and commuting. While Denver Law offers stipends to

approximately 50 students per summer for unpaid externships, including the students involved with this program, our stipend fund is still competitive and not every applicant receives funding. We, however, are willing to guarantee a stipend to the students in this program, but it is still not enough given the extraordinary costs. While the combined stipends do not compete financially with many of the weekly or hourly stipends offered to externships, they still serve as additional motivations for students to seek out such a unique and innovative learning opportunity.

Finally, our data shows that externships and post graduate employment are strongly related. Students who complete externships are more likely to be employed upon graduation, contributing to our legal community right away. Further, typically at least 30 percent of students work upon graduation at a former externship site. Far more have indirect connections. For example, many work at placements identified through relationships established during their externships. If students can make connections now, early in their legal careers, in a particular region and/or with particular lawyers, I believe they will be more likely to contribute to the community, care about related access to justice causes, and lawyer with a deeper compassion and understanding of serving “the rural client.”

I urge you to fund the program fully. We will continue to partner with the program as it expands. As you navigate your decision-making process, please do not hesitate to contact me with any questions or concerns.

Best,

Alexi Freeman/s/

Associate Dean of Diversity, Equity and Inclusion
Director of Externships and Social Justice Initiatives
Professor of the Practice
University of Denver Sturm College of Law
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Greater Colorado Law Student Experience



- Pueblo -

Dear Elizabeth Akalin and the Colorado Bar Foundation Trustees,

We are writing in support of the Greater Colorado Law Student Experience (GCLSE). We are a group of dedicated legal professionals in Pueblo who very much hope to be able to bring the GCLSE program to Pueblo County next year.

Colorado, like much of the nation, is facing a significant issue with providing legal services to citizens in rural and underserved areas. The primary driver of this is the lack of attorneys taking up the opportunity to practice outside well-served major urban areas. This problem, commonly referred to as legal deserts, will require a multi-faceted approach to resolve.

The GCLSE is an exciting new program that can greatly increase attorney recruitment in Greater Colorado. This program works with Colorado's law schools to recruit law students to complete an eight-week externship program in a judicial district outside of the Denver Metro area. Students in the program are afforded the opportunity to live and work in diverse and underserved communities that otherwise likely could not support a robust externship program. It is vital to the GCLSE that students are provided funding for temporary housing and living expenses associated with the externship. By providing a stipend to cover living expenses for the eight-week program, we can remove a major barrier to students exploring the opportunities in Greater Colorado. It is for that reason that we are asking the Colorado Bar Foundation for your support.

Pueblo County is certainly an underserved community. Our local legal community has just 1 attorney for every 1136 citizens in the county (by comparison Denver County has 1 attorney for every 101 citizens). Our local legal community simply does not have the number of attorneys that are necessary to meet the needs of our citizenry. It is abundantly clear that without concerted action this problem is only going to get worse. For that reason, the GCLSE – Pueblo Working Group was formed. We have already secured commitments from Colorado State University Pueblo (housing), the 10th Judicial District (externships), and Colorado Legal Services (community service). Our group is committed and will work diligently to provide law students with an excellent experience and to expose them to all the benefits that come from living and working in the Pueblo area. Having the financial backing of the Colorado Bar Foundation would be a major boon for this program and would ensure that we can draw applicants from all backgrounds and circumstances.

If you have any questions about the program or if there is any other information we can provide, please do not hesitate to ask. Our group is more than happy to speak with the Colorado Bar Foundation regarding the program and its anticipated impact on our community.

Thank you very much, for your time and consideration.

GREATER COLORADO LAW STUDENT EXPERIENCE – PUEBLO:

Working Group

<i>Hon. Allison Ernst</i> District Court Judge 10th Judicial District	<i>Johnna Doyle</i> Deputy General Counsel Colorado State University	<i>Kendra Oyen</i> Oyen Law	<i>Gail Rodosevich</i> Chair: Access to Justice Committee Pueblo County	<i>Danita Alderton</i> President: Pueblo County Bar Assoc.
<i>Kyle Aber</i> Chair: GCLSE – Pueblo	<i>David Dingess</i> Deputy District Atty 10 th Judicial District	<i>Wes Hassler</i> Hassler Law Firm	<i>Timothy Castillo</i> Paralegal Integrated Document Solutions	<i>Bernadette Shetrone</i> Law Office of Bernadette Shetrone

Greater Colorado Law Student Experience

19th Judicial District, 8th Judicial District & the 13th Judicial District

Dear Mr. Brown and the Trustees of the Colorado Bar Foundation:

We are writing in support of the Greater Colorado Law Student Experience (GCLSE). We are a group of attorneys and judicial officers working towards establishing a GCLSE experience in the 19th Judicial District (Weld County), the 8th Judicial District (Larimer & Jackson Counties) and the 13th Judicial District (Kit Carson, Logan, Morgan, Phillips, Sedgwick, Washington & Yuma Counties).

Much like our Greater Colorado neighbors in Pueblo, we are facing significant issues with providing legal services to citizens in rural and underserved areas. Greater Colorado is experiencing a critical lack of attorneys willing to practice outside of the metro Denver area, and something must be done to ensure access to justice for those in our communities. We wish to provide the opportunity for a GCLSE experience for the legal interns during the summer of 2023 (and beyond).

The GCLSE is a vital component in increasing attorney recruitment in Greater Colorado. It provides law students an opportunity to gain practical experience in public interest work and learn how to set up a successful law practice in underserved areas. Beyond this, it provides a conduit for real and meaningful connections in those communities, which is the key to bringing new lawyers to these legal deserts.

During this eight-week internship, students will work with the courts and local practitioners in the 19th, 13th, and the 8th Judicial Districts. The purpose of this internship goes beyond the traditional big law model. The GCLSE seeks to connect students with the greater Colorado community they serve and provide them with mentors and future colleagues. In doing so, the GCLSE makes the possibility of practicing in greater Colorado a real option for students.

A critical part of the GCLSE model is providing a stipend to cover the living and housing costs during the students eight-week internship. Public interest service, and solo practice in Greater Colorado is daunting enough, without requiring students to add to their ballooning law school debt during the summers. By providing a stipend to cover living expenses for the eight-week program, we can remove a major barrier to students exploring the opportunities in Greater Colorado. In turn, we will be investing in the future of Access to Justice in Greater Colorado. It is for this reason that we are asking the Colorado Bar Foundation for your support.

If you have any questions about the program, or if there is any other information we can provide, please do not hesitate to ask. Our group is more than happy to speak with the Colorado Bar Foundation regarding the program and its anticipated impact on our community.

Thank you very much, for your time and consideration:

Judge Vincent G. Vigil
(8th Judicial)

Chief Judge Susan Blanco
(8th Judicial)

Chief Judge Carl S. McGuire III
(13th Judicial)

William Garcia
Weld County Bar President

Rebekah Berry-Cheney
Larimer County Bar President

Ian McCargar
Town Attorney Windsor

Claire N.L. Havelda
Colorado Bar Association
Vice President Region 3

Dan St. John
Executive Council Member CBA
Young Lawyers