About the Authors


Philip R. Feist received his B.A. degree from the University of California at Davis, his Master of Theology degree from the Dallas Theological Seminary, and his J.D. from the University of San Diego School of Law. He is admitted to practice law in Oklahoma, California, Texas, Florida, Kansas (inactive) and the U.S. Virgin Islands (inactive), and is certified by the State Bar of California as a specialist in Estate Planning, Trust and Probate Law. He is a member of the Tulsa County Bar Association, the Los Angeles County Bar Association and the Dallas Bar Association. He is of-counsel with the law firm of Doerner Saunders Daniel & Anderson, LLP, in Tulsa, Oklahoma, practicing in the areas of estate planning, family business planning, and asset protection planning. He provided technical legal and drafting advice to the Oklahoma State Legislature on its 2014 revisions to the Oklahoma Family Wealth Preservation Trust Act, is a contributor to Asset Protection: Domestic and International Law and Tactics, published by Thomson Reuters, and is a frequent presenter at continuing legal education seminars in the areas of estate planning, tax-sensitive estate planning, family business succession planning, family entity planning and asset protection planning. He was honorably discharged from the U.S. Navy, and he and his wife, Ruth, have three children and seven grandchildren.
Acknowledgments

I consider myself extremely fortunate to have had the assistance of experienced trust professionals in the preparation of this book. The name, affiliation, and contact information of the contributor appears at the beginning of each contributed form. The following is an alphabetical listing of the contributors:

Maria Baler
Susan T. Bart
Timothy G. Carroll
Sara W. Condon
Martin S. Edwards
Michael M. Gordon
Peter S. Gordon
Steven B. Gorin
Robert E. Hamilton
Louis S. Harrison
Stacee A. Hasenbalg
David B. Hirschey
John Arthur Jones
Edward F. Koren
Daniel F. Lindley
Donna E. Morgan
Matthew J. Nolfo
Thomas R. Pulsifer
Debra Shurson Repya
Kurt R. Steinkrauss
Richard L. Stockton
Bruce Stone
Prof. Valerie J. Vollmar
Andrew J. Willms

I wish to thank Rebecca Wallenfelsz for her comments and suggestions with respect to the tax commentary in Section 1031.

I also wish to acknowledge the contributions of Hilary Homer, legal content editor, and Natalie Macquire, production manager. Their insightful comments and suggestions were of great value in the preparation of the manuscript.

MYRON KOVE
NEW YORK, NY
OCTOBER 2008
The contributions of the following to Chapter 51, Domestic Asset Protection Trusts, are gratefully acknowledged:

For the Alaska Asset Protection Trust Act, Bethann Boudah Chapman, Esq. (Faulkner Banfield, Juneau, Alaska); for the Delaware Qualified Dispositions in Trust Act, Miguel D. Pena, Esq. (The Law Office of Denise D. Nordheimer, Esq., LLC, Wilmington, Delaware); for the Hawaii Permitted Transfers In Trust Act, Rhonda L. Griswold, Esq. and Summer G. Shelverton, Esq. (Cades Schutte, Honolulu, Hawaii); for the Michigan Qualified Dispositions in Trust Act, Robert P. Tiplady, Esq. (Dykema Law Firm, Ann Arbor, Michigan); for the Missouri Asset Protection Trust Act, Keith A. Herman, Esq. (Greensfelder Hemker & Gale, St. Louis, Missouri); for the Mississippi Qualified Disposition in Trust Act, Barry K. Jones, Esq. (Pettis, Barfield & Hester P.A., Jackson, Mississippi); for the Nevada Self-Settled Spendthrift Trust, Layne T. Rushforth, Esq. (Rushforth Lee & Kiefer LLP, Las Vegas, Nevada); for the New Hampshire Qualified Dispositions in Trust Act, David Mulhern, Esq. and James P. Mulhern (Mulhern & Scott PLLC, Portsmouth, New Hampshire); for the Ohio Legacy Trust Act, Ted Gudorf, Esq. and Michael J. Menninger, Esq. (Gudorf Law Group, LLC, Dayton, Ohio); for the Rhode Island Qualified Dispositions in Trust Act, David T. Riedel, Esq. and Chad E. Nelson, Esq. (Adler Pollock & Sheehan, P.C., Providence, Rhode Island); for the South Dakota Qualified Disposition in Trusts Act, Jordan D. Veurink, Esq. (Lindquist & Vennum, Sioux City, South Dakota); for the Tennessee Investment Services Act of 2007, J. Scott Griswold, Esq. (Hodges, Doughty & Carson, PLLC, Knoxville, Tennessee); for the Utah Asset Protection Trust Act, Robert S. (Rust) Tippett, Esq. (Bennett Tueller Johnson & Deere, Salt Lake City, Utah); for the Virginia Self-Settled Asset Protection Trust, and Uniform Trust Act, Charles D. Fox IV, Esq. and Stephen W. Murphy, Esq. (Private Wealth Services Group, McGuireWoods LLP, Charlottesville, Virginia); for the West Virginia Qualified Self-Settled Spendthrift Trust, Christopher J. Winton, Esq. (Ray, Winton & Kelley, PLLC, Charleston, West Virginia); for the Wyoming Qualified Spendthrift Trust and Discretionary Asset Protection Trust, Ted Gudorf, Esq. (Gudorf Law Group, LLC, Dayton, Ohio) and M. Jason Majors, Esq. (Majors Law Firm, P.C., Jackson, Wyoming).

PHILIP R. FEIST, ESQ.
NOVEMBER 2017
THOMSON REUTERS
WESTLAW™

MOST PREFERRED ONLINE LEGAL RESEARCH SERVICE

Thomson Reuters Westlaw has been voted the #1 Best Online Legal Research vendor year-after-year by industry professionals. That’s because we continually invest more than any other online legal research provider in our people and technology where it matters most. As a result, you find exactly what you need quickly and confidently.

• Build the strongest argument with the most comprehensive collection of legal content

• Deliver better results confidently with WestSearch®, the only search engine designed specifically for the law

• Rely on the most current version of the law with proprietary editorial enhancements

• Access your legal research anytime, anywhere with the free Westlaw apps

LEARN MORE: legalsolutions.com/westlaw
SIGN ON: westlaw.com
24/7 REFERENCE ATTORNEYS: 1-800-REF-ATTY (733-2889)
RELATED PRODUCTS

Drafting Wills and Trust Agreements
Robert P. Wilkins
(Michael L.M. Jordan, Editor)

Drafting Wills and Trust Agreements on GhostFill™

Trusts
William W. Brown

Trusts and Trustees
George G. Bogert, George T. Bogert, Amy Morris Hess, and others

Revocable Trusts, 5th
George M. Turner

Irrevocable Trusts, 3d
George M. Turner

Wills
Lawrence P. Keller

Will Contests, 2d Rev
Eunice L. Ross and Thomas J. Reed

Westlaw®,
West CD-ROM Libraries™
WIN®

Thomson Reuters thanks you for subscribing to this product. Should you have any questions regarding this product please contact Customer Service at 1-800-328-4880 or by fax at 1-800-340-9378. If you would like to inquire about related publications or place an order, please contact us at 1-800-344-5009.

Thomson Reuters
610 Opperman Drive
Eagan, MN 55123

legalsolutions.thomsonreuters.com