ROBERT H. SITKOFF

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EDUCATION

The University of Chicago Law School, Chicago, Illinois
J.D. with High Honors, June 1999
Order of the Coif
John M. Olin Prize (outstanding graduate in law and economics)
Managing Editor, *University of Chicago Law Review*
John M. Olin Student Fellow in Law and Economics
Joseph Henry Beale Prize (outstanding research and writing)
Floyd Russell Mechem Scholarship (merit scholarship)

The University of Virginia, Charlottesville, Virginia
B.A. with Distinction, May 1996
Echols Scholar
Principal's Award, Brown Residential College at Monroe Hill

HONORARY DEGREE

Harvard University, Cambridge, Massachusetts
M.A. (hon.), May 2008

EXPERIENCE

Harvard Law School, Cambridge, Massachusetts
John L. Gray Professor of Law (2007 – present)
John L. Gray Visiting Professor of Law (Spring 2007)
Courses: Trusts and Estates
Estate and Gift Tax
Economic Theories of Bequests
Fiduciary Investing After the Financial Crisis
The Revolution in Modern American Trust Law
Trust Law: Current Topics, Theories, and Evidence
Service: Administrative Board (2010 – present, Chair since 2014), Title IX Local Option Committee (ex officio, 2014 – 2015); Title IX Implementation Committee (2014), Admissions Committee (2009 – 2010), Faculty Workshops (2008 – 2009)

New York University School of Law, New York, New York
Professor of Law (2006 – 2007)
Visiting Professor of Law (Fall 2005, Spring 2008)
Courses: Trusts and Estates
Teaching Award: Podell Distinguished Teaching Award (2007)

Northwestern University School of Law, Chicago, Illinois
Associate Professor of Law (2004 – 2006)
Assistant Professor of Law (2000 – 2004)
Courses: Estates and Trusts, Business Associations, Contracts, Corporations, Law and Economics Colloquium
Service: Program Director, Business Enterprise Concentration (2002-05), Tax Lateral Appointments Subcommittee (2002 – 2003), Judicial Clerkship Committee (Chair 2000 – 2002, Member 2003 – 2005), Entry Level Appointments Subcommittee (2000 – 2001), Law and Economics Speaker Series Committee (2000 – 2001)
Teaching Awards: Outstanding First-Year Course Professor (2000-01), Dean's Teaching Award (2001 – 2002)

The University of Michigan Law School, Ann Arbor, Michigan
Visiting Associate Professor of Law (Winter 2004)
Courses: Trusts and Estates I
Trusts and Estates II

Honorable Richard A. Posner, Chief Judge, United States Court of Appeals for the Seventh Circuit, Chicago, Illinois
Law Clerk, 1999 – 2000 Term

PUBLICATIONS

Books

LAWYERS, BANKS, AND MONEY: THE REVOLUTION IN AMERICAN TRUST LAW (Yale University Press, under contract) (with Max Schanzenbach)

THE OXFORD HANDBOOK OF FIDUCIARY LAW (Oxford University Press, in press) (with Evan J. Criddle & Paul B. Miller)

WILLS, TRUSTS, AND ESTATES (Wolters Kluwer, 10th ed. 2017) (with Jesse Dukeminier) (plus Teacher's Manual)

WILLS, TRUSTS, AND ESTATES (Wolters Kluwer, 9th ed. 2013) (with Jesse Dukeminier) (plus Teacher's Manual)

WILLS, TRUSTS, AND ESTATES (Aspen Publishers, 8th ed. 2009) (with Jesse Dukeminier & James Lindgren) (plus Teacher's Manual)

WILLS, TRUSTS, AND ESTATES (Aspen Publishers, 7th ed. 2005) (with Jesse Dukeminier, Stanley M. Johanson & James Lindgren) (plus Teacher's Manual)

Chapters in Books

"A Taxonomy of American Trust Law: Adaptation for Private Ordering," in *The Oxford Handbook of the New Private Law* (Andrew Gold, John C.P. Goldberg, Daniel B. Kelly, Emily L. Sherwin & Henry E. Smith, eds., Oxford University Press, forthcoming 2020) (with John Morley)

"Extrinsic Fiduciary Duties," in *Fiduciaries and Trust: Ethics, Politics, Economics and Law*, (Paul B. Miller & Matthew Harding, eds., Cambridge University Press, forthcoming 2020)

"Fiduciary Principles in Trust Law," in *The Oxford Handbook of Fiduciary Law* (Evan J. Criddle, Paul B. Miller, and Robert H. Sitkoff, eds., Oxford University Press, forthcoming 2019)

"Other Fiduciary Duties: Implementing Loyalty and Care," in *The Oxford Handbook of Fiduciary Law* (Evan J. Criddle, Paul B. Miller, and Robert H. Sitkoff, eds., Oxford University Press, forthcoming 2019)

"Freedom of Disposition in American Succession Law," in *Freedom of Testation and its Limits* (Antoni Vaquer ed., Marcial Pons, forthcoming 2018)

"The New Uniform Directed Trust Act Paves the Way for Creative and Thoughtful Divided Trusteeship" in 52 *Annual Heckerling Institute on Estate Planning* (Tina Portando, ed., forthcoming 2018) (with John Morley)

"An Economic Theory of Fiduciary Law," in *Philosophical Foundations of Fiduciary Law* (Andrew Gold & Paul Miller, eds., Oxford University Press, 2014)

"Trust Law as Fiduciary Governance Plus Asset Partitioning," in *The Worlds of the Trust* (Lionel Smith, ed., Cambridge University Press, 2013)

"Perpetuities, Taxes, and Asset Protection: An Empirical Assessment of the Jurisdictional Competition for Trust Funds," in 42 *Annual Heckerling Institute on Estate Planning* (Tina Portando, ed., 2008) (with Max Schanzenbach)

"The American Statutory Business Trust: A Research Agenda," in *Regulation of Wealth Management* (Hans Tijo, ed., National University of Singapore, 2008)

Articles

"Making Directed Trusts Work: The Uniform Directed Trust Act," 44 *ACTEC Law Journal* 1 (forthcoming 2018) (with John Morley)

"The Rise of Trust Decanting in the United States," 23 *Trusts & Trustees* 976 (2017)

"The Prudent Investor Rule and Market Risk: An Empirical Analysis," 14 *Journal of Empirical Legal Studies* 129 (2017) (with Max Schanzenbach)

"Financial Advisers Can't Overlook the Prudent Investor Rule," *Journal of Financial Planning*, August 2016, at 28 (with Max Schanzenbach)

"Revocable Trusts and Incapacity Planning: More than Just a Will Substitute," 24 *Elder Law Journal* 1 (2016) (with David Feder)

"Unconstitutional Perpetual Trusts," 67 *Vanderbilt Law Review* 1769 (2014) (with Steven Horowitz)

"Trusts and Estates: Implementing Freedom of Disposition," 58 *St. Louis University Law Journal* 643 (2014)

"The Fiduciary Obligations of Financial Advisers Under the Law of Agency," *Journal of Financial Planning*, February 2014, at 42 (winner of the 2014 Richard J. Davis Legal/Regulatory/Ethics Award from the Investment Management Consultants Association)

"Torts and Estates: Remedying Wrongful Interference with Inheritance," 65 *Stanford Law Review* 335 (2013) (with John C.P. Goldberg)

"The Economic Structure of Fiduciary Law," 91 *Boston University Law Review* 1039 (2011)

"The Prudent Investor Rule and Trust Asset Allocation: An Empirical Analysis," 35 *ACTEC Journal* 314 (2010) (with Max Schanzenbach)

"Agency Costs, Charitable Trusts, and Corporate Control: Evidence From Hershey's Kiss-Off," 108 *Columbia Law Review* 749 (2008) (with Jonathan Klick)

"Did Reform of Prudent Trust Investment Laws Change Trust Portfolio Allocation?," 50 *Journal of Law and Economics* 681 (2007) (with Max Schanzenbach)

"Perpetuities or Taxes? Explaining the Rise of the Perpetual Trust," 27 *Cardozo Law Review* 2465 (2006) (with Max Schanzenbach)

"The Lurking Rule Against Accumulations of Income," 100 *Northwestern University Law Review* 501 (2006)

"Jurisdictional Competition for Trust Funds: An Empirical Analysis of Perpetuities and Taxes," 115 *Yale Law Journal* 356 (2005) (with Max Schanzenbach)

"The Trust as 'Uncorporation': A Research Agenda," 2005 *University of Illinois Law Review* 31 (2005)

"An Agency Costs Theory of Trust Law," 89 *Cornell Law Review* 621 (2004)

"Politics and the Business Corporation," 26 *Regulation* 30 (Winter 2003-04)

"Trust Law, Corporate Law, and Capital Market Efficiency," 28 *Journal of Corporation Law* 565 (2003)

"Corporate Political Speech, Political Extortion, and the Competition for Corporate Charters," 69 *University of Chicago Law Review* 1103 (2002)

Other

Book Review, "Current Issues in Succession Law" and "Passing Wealth on Death: Will-Substitutes in Comparative Perspective," 76 *Cambridge Law Journal* 674 (2017)

"Fiduciary Financial Advisors and the Incoherence of A 'High-Quality Low-Fee Safe Harbor" (Sept. 2015), available at http://ssrn.com/abstract=2661833

"Top-Down versus Bottom-Up Law Reform in Trusts and Estates: Future Interests and Perpetuities," www.jotwell.com (Nov. 22, 2010) (review)

"Corporate Governance Roundtable: Theory Informs Business Practice Symposium," 77 *Chicago-Kent Law Review* 235 (2001) (transcript of roundtable discussion)

Comment, "'Mend the Hold' and *Erie*: Why an Obscure Contracts Doctrine Should Control in Federal Diversity Cases," 65 *University of Chicago Law Review* 1059 (1998) (student note)

LAW REFORM ACTIVITY

American Law Institute

Member (2007 – present)
Council Member (2012 – present)
  Projects Committee (2012 – present)
Advisers Group for Restatement of Charitable Nonprofits (2015 – present)
Advisers Group for Restatement (Third) of Conflicts of Law (2015 – present)
Various Members' Consultative Groups, including Restatement (Third) of Trusts (2007 – 2011) and Restatement (Third) of Property, Wills, and Other Donative Transfers (2007 – 2011)

Uniform Law Commission

Commissioner from Massachusetts (by gubernatorial appointment, 2008 – present)
  Member, Drafting Committee for an Electronic Wills Act (2017 – present)
  Member, Ethics Working Group (2017 – present)
  Member, Enactment Committee, Uniform Directed Trust Act (2017 – present)
  Member, Academic Partnerships Committee (2016 – present)

- Member, Drafting Committee to revise the Uniform Principal and Income Act (2015 – 2017)
- Chair, Drafting Committee for a Directed Trust Act (2014 – 2017)
- Member, Drafting Committee for the Uniform Trust Decanting Act (2013 – 2015)
- Member, Drafting Committee on Series of Unincorporated Business Entities (2012 – 2014)
- Co-Chair, Study Committee on Trust Protectors (Member 2012 – 2014, Co-Chair 2014)
- Member, Drafting Committee for the Uniform Powers of Appointment Act (2011 – 2013)
- Member, Study Committee on Series of Unincorporated Business Entities (2011 – 2012)
- Member, Drafting Committee for the Uniform Premarital and Marital Agreement Act (2010 – 2012)
- Member, Committee to Review the Uniform Law Commission Drafting Process (2009 – 2011)

Joint Editorial Board for Uniform Trusts and Estates Acts (Liaison Member, 2009 – present)

Reporter, Uniform Statutory Trust Entity Act (2003 – 2009)

REFEREE ACTIVITY

American Law and Economics Association
American Law and Economics Review
Aspen Publishers (Board of Editorial Advisors)
Cambridge University Press
Heckerling Institute on Estate Planning (Advisory Committee)
Israel Science Foundation
Journal of Empirical Legal Studies
Journal of Legal Studies
Killam Program, Canada Council for the Arts
MIT Press
National Science Foundation
Oxford University Press
Succession and Family Law (International Scientific Committee)
Trusts & Trustees (Editorial Board)
Wills, Trusts, and Estates Abstracts (Editor), Social Science Research Network
Yale University Press

GRANTS

American College of Trust and Estate Counsel Foundation, 2005 – present (for the Wills, Trusts, and Estates abstracting journal in the Social Science Research Network)

Searle Fund for Policy Research, 2002-2003 (for research on the political economy of trust law reform)

SELECTED PROFESSIONAL ASSOCIATIONS

American College of Trusts and Estates Counsel, Academic Fellow
Member, Amicus Review Committee (2014 – present)
American Law and Economics Association
American Law Institute
Executive Committee, Section on Trusts and Estates, Association of American Law Schools (2006-2011, Chair in 2009-2010)

STATE BAR ADMISSIONS

New York, Illinois, and Massachusetts

SELECTED RESEARCH PRESENTATIONS

The Law and Economics of Environmental, Social, and Governance Investing by a Fiduciary

- Global Corporate Governance Conference, Harvard Law School (June 2, 2018)
- Bessemer Trust (May 23, 2018)
- U.S. Trust/Bank of America (May 22, 2018)
- Trust Management Association, 2018 Trust and Wealth Executive Seminar (May 2, 2018)
- Law and Economics Workshop, Harvard Law School (scheduled for February 27, 2018)
- Corporate Work-in-Progress Luncheon, Harvard Law School (October 17, 2017)

Trusts and Estates: Implementing Freedom of Disposition (and other titles)

- Conference on Freedom of Testation and its Limits, University of Lleida, Spain (April 20, 2018)
- Edward J. Kelly Memorial Lecture in Elder Law, Notre Dame Law School (March 17, 2014)
- Delaware Bankers Association, 2013 Delaware Trust Conference (October 1, 2013)

Other Fiduciary Duties: Implementing Loyalty and Care

- Fiduciary Law: Charting the Field, Harvard Law School (November 11, 2017)

The Prudent Investor Rule and Market Risk: An Empirical Analysis (and other titles)

- Boston Probate and Estate Planning Forum (June 7, 2017)
- The International Society for New Institutional Economics, Annual Conference, Harvard Law School (June 20, 2015)

- Law and Economics Workshop, Stanford Law School (February 26, 2015)
- Estate Planning Council of Delaware (October 7, 2014)
- Private Law Workshop, Harvard Law School (September 10, 2014)
- Law and Economics Workshop, Harvard Law School (September 9, 2014)
- Faculty Workshop, Harvard Law School (June 26, 2014)
- Corporate Work-in-Progress Luncheon, Harvard Law School (March 4, 2014)
- Investment Advisors and the Management of Assets Subject to Trusts, Federated Investors, Harvard Club of New York (May 22, 2013)
- 35th Annual UCLA/CEB Estate Planning Institute, Los Angeles (May 3, 2013)
- Planned Giving Group of New England, Boston (March 6, 2013)
- American Law Institute, 89th Annual Meeting, Washington D.C. (May 21, 2012)
- Estate Planning, Charitable Giving, and Probate Seminar, sponsored by the University of Texas at Austin and Austin Bar Association, Austin (April 20, 2012)
- Revisiting the Prudent Investor Rule in 2011, Columbia Law School and New York State Bar Association, New York (September 23, 2011)

Revocable Trusts and Incapacity Planning: More than Just a Will Substitute
- Ann F. Baum Memorial Elder Law Lecture, University of Illinois College of Law (March 9, 2015)

Unconstitutional Perpetual Trusts
- Notre Dame Law School (March 17, 2014)
- Symposium, The Role of Federal Law in Private Wealth Transfer, Vanderbilt University School of Law (February 21, 2014)

The Law and Economics of Divided Trusteeship
- American Bankers Association, Wealth Management and Trust Conference, February 27, 2014)
- Investment Advisors and the Management of Assets Subject to Trusts, Federated Investors, Harvard Club of New York (May 22, 2013)
- Delaware Bankers Association, 2011 Delaware Trust Conference (November 29, 2011)
- Boston Probate and Estate Planning Forum (June 2, 2010)

Torts and Estates: Remedying Wrongful Interference with Inheritance
- Boston Probate and Estate Planning Forum (March 12, 2014)
- Law and Economics Workshop, Harvard Law School (September 11, 2012)
- Faculty Workshop, Harvard Law School (June 20, 2011)
- Conference on Property, Tort, and Private Law Theory, University of Southern California Gould School of Law (October 23, 2010)

The Economic Structure of Fiduciary Law (and other titles)
- Conference on Philosophical Foundations of Fiduciary Law, DePaul University College of Law (July 19, 2013)

- Fiduciary Status and the Wealth Management Industry in the 21st Century, Federated Investors, Harvard Faculty Club (October 27, 2011)
- Conference on Fiduciary Law, Boston University School of Law (October 29, 2010)
- 2010 Retirement Forum, Federated Investors, New York (February 2, 2010); 2009 Retirement Forum, Boston (September 15, 2009)

Lawyers, Banks, and Money: The Quiet Revolution in Trust Law (and other titles)

- Estate Planning Council of Delaware (June 10, 2010)
- Estate Planning Council of St. Louis (May 10, 2010)
- New England Regional Meeting, American College of Trusts and Estates Counsel (September 13, 2009)
- John L. Gray Chair Investiture, Harvard Law School (April 29, 2009)
- Joseph Trachtman Memorial Lecture, American College of Trusts and Estates Counsel (March 7, 2009)
- Delaware Bankers Association, 2008 Delaware Trust Conference (December 3, 2008)

Law and the Equal Division Puzzle: The Role of Trusts and Transaction Costs (and other titles)

- Harvard Law School, Law and Economics Workshop (April 14, 2009)
- George Washington University Law School, Faculty Workshop (April 2, 2009)
- Massachusetts Continuing Legal Education, 2009 Annual Estate Planning Conference (January 9, 2009)
- American Law and Economics Association, Annual Meeting, Columbia Law School (May 16-17, 2008)
- Symposium, Inheritance Law in the Twenty-First Century, UCLA School of Law (February 8, 2008)

The Rise of the Statutory Business Trust (and other titles)

- Delaware Bankers Association, 2009 Delaware Trust Conference (December 2, 2009)
- Corporate Work-in-Progress Luncheon, Harvard Law School (October 6, 2009)
- Queens University, Faculty of Law, Osler, Hoskin & Harcourt Distinguished Lectures in Business Law (March 27, 2009)
- Amakasu Foundation Lecture Series, Tokyo, Japan (March 17-20, 2008)
- Widener University School of Law, 2007 Widener Scholar in Residence in Corporate Law (October 5, 2007)
- Singapore Conference on International Business Law (via recording) (August 22, 2007)
- Section on Agency, Partnership, LLCs and Unincorporated Associations, Annual Meeting of the Association of American Law Schools (January 4, 2007)
- Midwest Law and Economics Association Annual Meeting, Northwestern University School of Law (October 15, 2005)
- Canadian Law and Economics Association Annual Meeting, University of Toronto (September 18, 2004)

- Northwestern University School of Law, Faculty Workshop, Zodiac Paper Group (April 21, 2004)
- University of Michigan, Fawley Workshop Series (March 24, 2004)

Agency Costs, Corporate Control, and Charitable Trusts: Evidence From Hershey's Kiss-Off
- Widener University School of Law, Faculty Workshop (October 4, 2007)
- Georgetown Law School, Law and Economics Workshop (September 28, 2007)
- American Law and Economics Association, Annual Meeting, Harvard Law School (May 5-6, 2007)
- Corporate Work-in-Progress Luncheon, Harvard Law School (February 6, 2007)
- New York University School of Law, Faculty Workshop (November 20, 2006)
- The University of Illinois College of Law, Corporate Law Colloquium (October 10, 2006)

Did Reform of Prudent Trust Investment Laws Change Trust Portfolio Allocation? (and other titles)
- New York Bankers Association, 62nd Annual Trust and Investment Conference (October 2, 2008)
- Amakasu Foundation Lecture Series, Tokyo, Japan (March 17-20, 2008)
- 42nd Annual Heckerling Institute on Estate Planning (January 17, 2008)
- Massachusetts Continuing Legal Education, 2008 Annual Estate Planning Conference (January 11, 2008)
- Delaware Bankers Association (October 5, 2007)
- Wealth Management Leader's Forum, Prudential Investments (September 27, 2007)
- NYU/Penn Law and Finance Conference, New York University (February 23-24, 2007)
- Harvard Law School, Faculty Workshop (February 22, 2007)
- New York University School of Law, Law and Economics Workshop (October 5, 2006)
- ALI-ABA, Representing Estate and Trust Beneficiaries and Fiduciaries (July 14, 2006)
- The University of Chicago Law School, Work-in-Progress Faculty Workshop (May 25, 2006)
- American Law and Economics Association, Annual Meeting, University of California at Berkeley (May 6, 2006)
- Washington University at St. Louis, Work, Families, and Public Policy Workshop (April 17, 2006)

Economic Analysis of Trust Law: An Introduction
- Section on Donative Transfers, Fiduciaries, and Estate Planning, Annual Meeting of the Association of American Law Schools (January 5, 2007)

Empirical Analysis of Trust Law: An Introduction

- Section on Donative Transfers, Fiduciaries, and Estate Planning, Annual Meeting of the Association of American Law Schools (January 5, 2006)

Jurisdictional Competition for Trust Funds: An Empirical Analysis of Perpetuities and Taxes (and other titles)

- New York Bankers Association, 62nd Annual Trust and Investment Conference (October 2, 2008)
- Amakasu Foundation Lecture Series, Tokyo, Japan (March 17-20, 2008)
- 42nd Annual Heckerling Institute on Estate Planning (January 17, 2008)
- Massachusetts Continuing Legal Education, 2008 Annual Estate Planning Conference (January 11, 2008)
- Delaware Bankers Association (October 5, 2007)
- Lincoln Institute of Land Policy, Cambridge, Massachusetts (March 2, 2007)
- New York University School of Law, Faculty Workshop (September 26, 2006)
- American Law and Economics Association, Annual Meeting, New York University (May 7, 2005)
- Stanford Law School, Law and Economics Workshop (March 17, 2005)
- Northwestern University School of Law, Faculty Workshop (March 1, 2005), Empirical Studies Colloquium (February 8, 2005)
- University of California at Davis, King Hall School of Law, Faculty Workshop (November 6, 2003)
- Midwest Law and Economics Association Annual Meeting, Indiana University School of Law (Indianapolis) (October 10, 2003)
- Canadian Law and Economics Association Annual Meeting, University of Toronto (September 19, 2003)

Perpetuities or Taxes? Explaining the Rise of the Perpetual Trust

- Symposium, Trust Law in the 21st Century, Benjamin N. Cardozo School of Law (September 19, 2005)
- Northwestern University School of Law, Faculty Workshop, Zodiac Paper Group (August 22, 2005)

Trust as "Uncorporation": A Research Agenda

- Conference on Uncorporation: A New Age, University of Illinois (April 23, 2004)
- Northwestern University School of Law, Faculty Workshop, Zodiac Paper Group (April 21, 2004)

An Agency Costs Theory of Trust Law (and other titles)

- Columbia Law School, Law and Economics Workshop (February 16, 2004)
- University of Michigan Law School, Legal Theory Workshop (January 13, 2004)
- University of Chicago Law School, Legal Scholarship Seminar (November 24, 2003; November 25, 2002)
- American Law and Economics Association Annual Meeting, University of Toronto (September 20, 2003)
- Harvard Law School, Law and Economics Workshop (September 16, 2003)

- Indiana University School of Law (Indianapolis), Faculty Workshop, (September 4, 2003)
- University of Chicago Law School, Law and Economics Workshop (January 21, 2003)
- King's College and London School of Economics (jointly sponsored), University of London (November 6, 2002)
- Centre for Corporate and Commercial Law, Faculty of Law, Cambridge University (November 5, 2002)
- Economics Seminar on Theories of Trusts, Nuffield College, Oxford University (November 4, 2002)
- Northwestern University School of Law, Faculty Workshop (October 17, 2002), Zodiac Paper Group (July 31, 2002)
- Midwest Law and Economics Association Annual Meeting, University of Illinois (October 11, 2002)
- Canadian Law and Economics Association Annual Meeting, University of Toronto (September 28, 2002)
- University of Virginia School of Law, Olin Program in Law and Economics Work-in-Progress Luncheon (August 29, 2002)

Trust Law, Corporate Law, and Capital Market Efficiency (and other titles)

- Northwestern University School of Law, Faculty Workshop, Zodiac Paper Group (July 23, 2003)
- Symposium, Revisiting "The Mechanisms of Market Efficiency," University of Iowa College of Law (April 4, 2003)

Corporate Political Speech, Political Extortion, and the Competition for Corporate Charters (and other titles)

- Sloan Program for the Study of Business in Society, The George Washington University Law School, 2002 Summer Retreat (June 25, 2002)
- University of Illinois College of Law, Faculty Workshop (May 2, 2002)
- Symposium on Management and Control of the Modern Business Corporation, University of Chicago Law School (February 9, 2002)
- University of Chicago Law School, Legal Scholarship Seminar (January 14, 2002)
- University of Michigan Law School, Law and Economics Workshop (December 6, 2001)
- Northwestern University School of Law, Faculty Workshop (April 5, 2000)
- Dirksen Building Paper Talk Group (October 4, 1999)

SELECTED OTHER PRESENTATIONS

Fiduciary Administration: State Law and Practice; Fiduciary Administration: Making Complex Fiduciary Decisions (and other titles)

- American Bankers Association, Trust School: September 27, 2018 (scheduled); September 28, 2017; September 29, 2016 [materials only]; October 1, 2015; September 17, 2014

The Uniform Law Commission's Project on Directed Trusts (and other titles)
- Boston Probate and Estate Planning Forum (June 6, 2018)
- American Bar Association, Section on Real Property, Trusts, and Estates (May 10, 2018)
- 52nd Annual Heckerling Institute on Estate Planning (January 25, 2018)
- Faculty Workshop, Harvard Law School (June 22, 2017)
- Corporate Work-in-Progress Luncheon, Harvard Law School (February 21, 2017)
- American Bankers Association, 2017 Wealth Management and Trust Conference (February 23, 2017)
- Delaware Bankers Association, 2016 Delaware Trust Conference (October 25, 2016)
- Fiduciary Inns of Court (Boston) (June 21, 2016)
- American College of Trust and Estate Counsel, State Laws Committee (June 19, 2016)
- Boston Probate and Estate Planning Forum (May 4, 2016)
- Boston Professional Fiduciaries Group (June 9, 2015)
- Boston Probate and Estate Planning Forum (April 1, 2015)

Don't Let This Happen to You: Perils of Fiduciary Litigation
- U.S. Trust/Bank of America, Investment Symposium: "Investing in the World's Mosaic" (March 31, 2016)

Trust Litigation in Delaware: An Inside Look at Gore, Mennen, and Kloiber
- Delaware Bankers Association, 2015 Delaware Trust Conference (October 26, 2015)

Expert Witnesses in Trusts and Estates Litigation (and other titles)
- Fiduciary Litigation Committee, Boston Bar Association (June 17, 2014)
- 46th Annual Heckerling Institute on Estate Planning (January 11, 2012)
- 22nd Annual Spring Symposia, ABA Section of Real Property, Trust, and Estate Law (April 28, 2011)

Fiduciary Investment Management: Risks and the Regulatory Environment
- U.S. Trust/Bank of America, Investment Symposium: "Driving Innovation" (March 20, 2014)

Back to School: A (Re)Introduction to the Law of Trusts
- 48nd Annual Heckerling Institute on Estate Planning (January 13, 2014)