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**Twisted** at an early age, cross examined first witness at age 14 in NFL (Forensics, not Football). Eight years of cross-examination debate. Liked it. Glad that society has roles for people with character flaws. University of Santa Clara—Honors Program studying Great Books. Junior year, Vienna, Austria: history, politics, psychology, excellent beer. Decided to get **more practical education**, MPA, Woodrow Wilson School, Princeton, economics, resource allocation, public policy analysis. Learned how to do regression analyses and had close personal relationships with heteroskedasticity and kurtosis. Joined US Justice Department (Community Relations Service), but 1A classification. **Two years in US Army**, subbasement of Pentagon, defending you from enemies domestic. While serving, lost my inheritance through abdication to investment adviser, resulting in heightened interest in investment duties and practice. I feel your pain. **Yale Law School**, JD and an editor of Yale Law Journal, ran Chubb Fellowship (not a weight loss program). **Clerked in Seattle with 9<sup>th</sup> Circuit Court of Appeals**; too wet for Californian, returned to San Francisco. Worked at Morrison & Foerster where started defending oil companies and trust departments. Easy choice of specialties. **Defended first fiduciary surcharge trial in 1977**. Since then represented dozens of corporate trust departments, most of which were merged into a few splendid institutions ( which are too large to fail). Admitted *pro haec vice* for cases in multiple States. **Started teaching Trust and Probate Litigation**, California Continuing Education for the Bar and American Bar Association, 1981. Planner, Editor and chapter author, CEB, TRUST AND PROBATE LITIGATION (1999 to present). Train risk managers (NATACP/Firma), bankers (National Graduate Trust School, regional bankers: New York, New England, Tri-State, Midwest, Texas, Tennessee, Washington etc.), trust regulators (FFIEC), Wealth Management and Trust conference (1990-2019), individual fiduciaries, Heckerling, AICPA, American Bar, ALI-CEB. **Member, National Conference of Lawyers and Corporate Fiduciaries** (2000-2006) and 2011-present. **ACTEC** (1991-present) (Litigation Committee and chair of subcommittee on Fiduciary Surcharge and Damage Remedies. **Group Chair**, Litigation and Dispute Resolution Group (2004-2007), American Bar Association, **Real Property Trust and Estate Law Section**; Council member (2007--2010), Continuing Legal Education Committee (2006-) Chaired committee on Probate and Trust Litigation (1984-1988, vice-chair 1988-1996), chaired Ethics-Malpractice Committee (1996-2003); Member, Standing Committee on Bioethics and the Law (1999-2003). International Academy of Estate and Trust Law **National College of Probate Judges**, attorney member, speeches (1985-.2017). **More publications than you would be remotely interested in reading**. **Still cross-examining witnesses**: Forty-six trials in probate, trust and investment cases and *pro haec vice* in multiple States, many more mediations and arbitrations as

neutral or judge pro tem. Completed 40 hour mediator training (conciliatory or evaluative, your choice). Expert witness. Occasionally impersonates Santa Claus for credulous children.