

# Mary E. Vandenack Curriculum Vitae

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## Brief Biography

Mary E. Vandenack, J.D., CAP®, COLPM®, ACTEC, Accredited Estate Planner® (Distinguished) Nominee, is CEO, founding and managing member of Vandenack Weaver Truhlsen in Omaha, Nebraska. Mary is also the founder of Legal Visionaries Podcast, Elite Concierge Trust and Estate Services LLC, Synergistic Estate and Care Coordination Services LLC, FormYourBusiness.com, and EstatePlanForMe.com. Mary is a highly regarded practitioner in the areas of tax, private wealth planning, high net worth estate planning, asset protection planning, philanthropy, business exit planning, executive compensation, equity fund development, real estate, benefits, business succession planning, tax dispute resolution, state and local tax, and tax-exempt entities. Mary's practice serves businesses and business owners, executives, real estate developers and investors, health care providers, professionals, companies in the financial industry, and tax-exempt organizations. Mary is a member of the American Bar Association Real Property Trust and Estate Section where she currently serves on Council and has previously served on Planning Committee and is former Co-Chair of the Futures Task Force and Technology and Economics of Law Practice Group. She has also served as Vice Chair of the Asset Protection Planning Committee. Mary is also a member of the American Bar Association Law Practice Division where she currently serves as Division Vice Chair and previously served as Editor-in-Chief of Law Practice magazine. She has served on the TechShow Board, Attorney Well-being Committee, Futures Task Force, Women Rainmakers, and the Executive Council. Mary has served on ABA SCOTIS, the ABA Presidential Youth at Risk Council, on the ABA President's Task Force on the Future of the Profession. Mary has won the James I. Keane Memorial Award in recognition of e-lawyering and innovation and was named to ABA LTRC Distinguished Women of Legal Tech. Mary has been highlighted in Fortune Magazine as a Women Leader in the Law, highlighted as Women in Business by the Midlands Business Journal, and was included in Women Leaders in the Law issues of American Lawyer, Corporate Counsel and the National Law Journal. Mary is a longtime commentator for Leimberg Services and is the host of the podcast, Legal Visionaries, a podcast dedicated to legal issues, innovation, professional leadership and well-being. Mary has been named to Marquis Who's Who in America, Super Lawyers and Best Lawyers in America. Mary is a professional writer and speaker on tax, benefits, asset protection planning, and trust and estate strategy as well as on law practice related topics including improving the delivery of legal services, innovation, ethics, technology in the practice of law, building sustainable law firms, and alternative fee structures. Mary is often asked to teach a yoga or mindfulness class while attending a conference or presenting on a substantive issue.

## Professional Positions

- Founding and Managing Member – Vandenack Weaver Truhlsen – October 2005 to present.
  - Vandenack Weaver Truhlsen is a tax, business, asset protection planning, trusts and estates boutique serving closely held businesses, their owners, professionals, and executives.
  - Vandenack Weaver Truhlsen is unique in offering family office services and life care planning services.
  - Practice Areas include Tax, Business Exit and Succession, Trusts & Estates, Real Estate, Asset Protection Planning, Health Care, Mental Health Law, and Tax-Exempt Entities
- Founder and Chairman of the Board – Elite Concierge Trust and Estate Services LLC, Synergistic Care Coordination Services LLC.
- Consultant Interactive Legal
- Private Practice Lawyer – 1992 to 2005 – Tax, Business, Trusts and Estates, Health Care and Asset Protection Planning Attorney – Partner at Koley Jessen PC; Fitzgerald Schorr Barmettler & Brennan; Abrahams, Caslow & Cassman LLP; Vandenack Law Office PC.

## Educational Background

- Creighton University School of Law, Omaha, Nebraska, Magna Cum Laude
- College of Saint Mary, Omaha, Nebraska, Summa Cum Laude
- University of Pennsylvania, Certificate of Positive Psychology
- University of Michigan, Master Track Certificate Social Work

## Professional Designations

- ACTEC
- COLPM
- CAP®
- Accredited Estate Planner® (Distinguished) Nominee

## Continuing Legal/Tax Education

- Federal Institute of Taxation, New York University, New York, New York: 2002, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022 with focus on partnership and real estate tax and structures; corporate tax; high net worth tax strategies and trusts and estates; international tax; state and local tax.
- Heckerling Tax Institute, Orlando, Florida: 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023.
- American Bar Association Real Property and Trust Spring Symposium: 2014, 2016, 2017, 2018, 2019, 2020, 2022.
- ACTEC Annual Meeting 2022.

## Teaching Experience

- Creighton University School of Law – Legal Research and Writing
- Creighton University School of Law – “Legal Writing” – Instructor
- VTI Institute Paralegal Studies –Business Law; Legal Research; Legal Terminology
- Fitness Instruction 2002- 2022 – yoga, pilates, spin, Bodypump and various other formats
  - Yoga Alliance RYT
  - ACE Fitness Certified Group Fitness
  - AED/CPR/First Aid – since 2002

## Legal Publications

- "Career Development & Wellness – The Power of Words – Words can Create Well-being (or Harm It) – Mary E. Vandenack – Probate & Property – January/February 2023
- “Mary Vandenack’s Notes from the 2022 81<sup>st</sup> Annual NYU Institute on Federal Taxation Conference” – LISI Estate Planning Newsletter #2998 – [VWT website](#) – November 29, 2022
- “Ethics, Technology, and Innovation in Law Practice” – Mary E. Vandenack – [Nebraska Lawyer Magazine](#) – September/October 2022
- "Culture Matters: Finding a Legal Culture Consistent with Your Values" – Mary E. Vandenack – [ABA Probate & Property](#) – September/October 2022
- "When to use Coaching, When to use a Psychologist – Some Tips on Finding the Right Fit" – Mary E. Vandenack – ABA Probate & Property – September/October 2022
- “Mary Vandenack’s Notes from the 2022 NYU Advanced Trusts and Estates Conference” – [LISI Estate Planning Newsletter #2975](#) – July 27, 2022
- “Mental Health Law” – Mary E. Vandenack, [metroMAGAZINE](#), July 11, 2022
- “Design a Flourishing Law Firm” – Mary E. Vandenack – [Law Practice Magazine](#) – July/August 2022

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- “My Life Is My Artwork: Create a Practice That is Part of the Artwork” – Mary E. Vandenack – [ABA Probate & Property](#) – July/August 2022
- "Mary Vandenack's Notes from the NYU 14<sup>th</sup> Annual Tax Controversy Forum" – [LISI Income Tax Planning Newsletter #222](#) – June 29, 2022
- “Modern Mindfulness: Being Mindful Doesn’t Mean I am Always Zen” – Mary E. Vandenack – [ABA Probate & Property](#) – May/June 2022
- “Mary Vandenack: Transcript from Legal Visionaries Podcast on Business and Tax Considerations Before Selling a Business” – Mary E. Vandenack, [LISI Business Entities Newsletter #250](#), May 2, 2022
- “Mary E. Vandenack, Abigail O’Connor & Martin Shenkman: 56<sup>th</sup> Annual Heckerling Institute Meeting Notes” – [LISI Estate Planning Newsletter #2953](#), April 18, 2022
- “Call it a Life Plan” – Mary E. Vandenack, [metroMAGAZINE](#), April 13, 2022
- “Deliberate Wellness – The Resilient Lawyer” Mary E. Vandenack – [ABA Probate & Property](#) – March/April 2022
- “The Matter of the Estate of Skip Beach” – Mary E. Vandenack – [LISI Estate Planning Newsletter #2937](#), February 10, 2022
- “Advancing Trusts and Estates Practices with Technology and Innovation: Become a Digital Innovation Specialist” – Mary E. Vandenack, [WealthCounsel Quarterly](#), Fall 2021
- “Mary Vandenack’s Notes from the NYU Institute on Federal Taxation” – Mary E. Vandenack, [LISI Estate Planning Newsletter #2923](#), November 29, 2021.
- “Making it Rain: Mary Vandenack” – Sharon Nelson interviewed Mary E. Vandenack, [Law Practice Today](#), September 14, 2021
- “Mary Vandenack's Notes from the NYU Advanced Trusts and Estates Conference” – Mary E. Vandenack, [LISI Estate Planning Newsletter #2897](#), August 2, 2021
- “Leaving a Big Law Firm to Start Your Own” – Mary E. Vandenack, [Law Practice Today](#), July 14, 2021
- "Evolving Law Firm Models with Innovation: Using Lessons Learned from the Pandemic" - Mary E. Vandenack, [Law Practice Magazine](#), July/August 2021
- "Notes on the 55th Annual Heckerling Institute on Estate Planning " - Mary E. Vandenack, [LISI Estate Planning Newsletter #2889](#), June 14, 2021
- “Great People to Have on Your Side” – Mary E. Vandenack, [metroMagazine](#), The Women’s Issue, June 8, 2021
- “Insurance Issue with Transfer on Death Deeds” – Mary E. Vandenack, [metroMagazine](#), The Women’s Issue, June 8, 2021
- "Mary Vandenack on Dawn Strope-Robinson v. State Farm Fire and Casualty: Insurance Risk for Transfer on Death Deeds" - Mary E. Vandenack, [LISI Estate Planning Newsletter #2871](#), March 17, 2021
- “Mary Vandenack on In re Trust of McGregor: Nebraska Supreme Court Finds Nonjudicial Settlement Agreement Violated Material Purpose of Trust Because It Ignored the Trust's Spendthrift Provision” – Mary E. Vandenack, [LISI Estate Planning Newsletter #2868](#), March 11, 2021
- “Mary E. Vandenack: The Evolution of Innovation, Technology and Estate Planning: Moving Toward a Concierge Practice” – Mary E. Vandenack, [LISI Estate Planning Newsletter #2867](#), March 2, 2021
- “Using Your Federal Estate Tax Exemption and Allowing Spousal Access (The SLAT)”, [Vandenack Weaver LLC](#)
- “Mary Vandenack on In re Estate of Michael R. Brinkman” – Mary E. Vandenack, [LISI Estate Planning Email Newsletter #2862](#), February 11, 2021
- “Strategies for a Possible Reduced Estate Tax Exemption” – Mary E. Vandenack and Michael J. Weaver, [metroMagazine](#), February 3, 2021
- “Next Generation Tech for Estate-Planning Lawyers - Employ lessons learned from going remote to make permanent changes” – Mary E. Vandenack & Martin M. Shenkman - [Trusts and Estates](#), February 2021
- “In The Office, Out of the office, Remote Challenges Outside, Safety Inside” – [Law Practice Magazine](#), January/February 2021
- “Learning How to Lead Differently in Times of Crisis” – Mary E. Vandenack, [Law Practice Magazine](#), November/December 2020

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- “Mary Vandenack’s Notes from the NYU Advanced Trusts and Estates Conference” – Mary E. Vandenack, [LISI Estate Planning Email Newsletter #2836](#), November 12, 2020
- “Mary Vandenack on Lee v. Argent Trust Company” – Mary E. Vandenack, [LISI Employee Benefits and Retirement Planning Email Newsletter #747](#), September 2020
- “The Tax Planning Checklist for Law Firms” – Mary E. Vandenack, [Law Practice Magazine](#), Sept/Oct 2020
- “Improve and Automate Financial Information” – Mary E. Vandenack, [Law Practice Magazine](#), Sept/Oct 2020
- “Rethinking Disposition Provisions of Trusts: Recent Trends and Approaches to Trust Design with an Asset Protection Focus” – Mary E. Vandenack, [Creighton Law Review](#), August 31, 2020
- “Estate Planning Issues in Divorce and Premarital Planning” – Mary E. Vandenack, [metroMAGAZINE](#), August/September 2020
- “Driving Innovation and Change in the Legal Industry” – Mary E. Vandenack, [Law Practice Magazine](#), July/August 2020
- “Congress Adds Flexibility for PPP Borrowers” – Mary E. Vandenack, co-author Michael Weaver, [metroMAGAZINE](#), June/July 2020
- “Mary Vandenack’s Notes from the NYU Federal Real Estate and Partnership Tax Conference” – LISI Income Tax Planning Newsletter #197, July 3, 2020 at <http://www.Leimbergservices.com>
- “How I am Changing My Practice, Client Meetings, Client Planning, and More to Address the Coronavirus” – Jonathan Blattmachr, Barron Henley, Thomas Tietz, Martin Shenkman, & Mary Vandenack – [ABA Section of Real Property, Trust and Estate Law](#)
- “Managing the Remote Law Practice Magazine” - Mary E. Vandenack, Martin Shenkman, & Jonathan Blattmachr - [NAEPC Journal of Estate and Tax Planning](#), May 2020
- “The Slow Return to the New Normal and Different Approaches to Signing/Executing Estate Planning Documents” Mary E. Vandenack, Martin M. Shenkman, Jonathan Blattmachr, Andrew Wolfe, and Thomas A. Tietz, [LISI Estate Planning Newsletter #2794](#), May 11, 2020
- “Law Firm Leadership and Management” – [Law Practice Magazine](#), May/June 2020
- “Business Continuity; Recovering From Covid-19” – Mary E. Vandenack, co-author Michael Weaver, [metroMAGAZINE](#), April 2020
- “What Has Covid-19 Taught Us About Resilience?” – Mary E. Vandenack, [metroMAGAZINE](#), April 2020
- “Managing the Remote Law Practice and Other Practical Administrative Considerations during Coronavirus” - Mary E. Vandenack, Martin Shenkman & Jonathan Blattmachr, [LISI Estate Planning Newsletter #2789](#), April 17, 2020
- “Retirement Plan Provisions of the CARES Act” – Mary E. Vandenack, [Retirement Daily](#), April 6, 2020
- “Retirement Plan Provisions of the CARES Act” – Mary E. Vandenack, [LISI Employee Benefits & Retirement Planning Email Newsletter #728](#), March 27, 2020
- “Taking Your Estate Planning Practice Remote in Short Order” – Mary E. Vandenack, [LISI Estate Planning Email Newsletter #2786](#), March 25, 2020
- “Families First Coronavirus Response Act – Provisions Expanding Requirements for Businesses to Provide Paid Emergency Leave” – Mary E. Vandenack & James S. Pieper, [LISI Employee Benefits & Retirement Planning Email Newsletter #726](#), March 23, 2020
- “Foundational Estate Planning Priorities in the Face of COVID-19” – Mary E. Vandenack, [LISI Estate Planning Newsletter #2784](#), March 18, 2020
- “Finding a Personalized Marketing Plan” – Mary E. Vandenack, [Law Practice Magazine](#), March/April 2020
- “When a Trademark Owner is Entitled to the Profits of a Competitor” - Mary E. Vandenack, [metroMAGAZINE](#), February 2020
- “How Long Do You Have to Keep Old Wills” – Mary E. Vandenack, [LISI Newsletter #2778](#): New York State Bar Association Committee on Professional Ethics Opinion 1182 February 2020
- “Remembering Copy Editor, John Fallahay” - Mary E. Vandenack, [Law Practice Magazine](#), January/February 2020
- “Planning to Sell a Closely Held Business” - Mary E. Vandenack, [metroMAGAZINE](#), December 2019

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- "Planning: Life, Estate, Asset Protection, Business, Transition" - Mary E. Vandenack, [metroMAGAZINE](#), October 2019
- "Mary Vandenack on Revenue Ruling 2019-19: Uncashed Retirement Plan Distribution Checks" - [LISI Employee Benefits and Retirement Planning Newsletter #709](#), September 12, 2019
- Commentary on the 11<sup>th</sup> Annual NYU Tax Controversy Forum - Mary E. Vandenack, [LISI Income Tax Planning Newsletter #182](#), July 18, 2019
- Commentary on the impact of the SECURE Act – Mary E. Vandenack, [LISI Employee Benefits and Retirement Planning Newsletter #707](#), May 28, 2019
- "Helping Lawyers Market Easily via Social Media" - Mary E. Vandenack, [Law Practice Magazine](#), March/April 2019
- Commentary on *In the Matter of the Estate of Lois B. Erickson* - Mary E. Vandenack, [LISI Estate Planning Newsletter #2688](#), December 6, 2018
- "Sustainable Trusts and Estates and Real Property Practices" - Mary E. Vandenack, [ABA Probate & Property](#) November/December 2018
- "Leaving Big Law to Forge a New Path" - Mary E. Vandenack, [ABA Probate & Property](#), November/December 2018
- "Facilitating Effective Communication as a Leader" - Mary E. Vandenack, [Law Practice Magazine](#), November/December 2018 Issue
- "Notes from the 77<sup>th</sup> Annual NYU Federal Institute of Taxation – Days 4-6" - Mary E. Vandenack, LISI Income Tax Planning Newsletter #160, November 5, 2018 at <http://www.leimbergservices.com>.
- "Notes from the 77<sup>th</sup> Annual NYU Federal Institute of Taxation – Days 1 -3" - Mary E. Vandenack, [LISI Income Tax Planning Newsletter #159](#), October 29, 2018
- "Estate Planning Considerations Under Internal Revenue Code 199A" - Mary E. Vandenack, [metroMAGAZINE](#), October 2018
- "The Impact of Tax Reform on Service Professionals" - Mary E. Vandenack, [metroMagazine](#), August 2018
- "The Sustainable Law Firm" - Mary E. Vandenack, [Law Practice Magazine](#), July/August 2018
- Mary Vandenack was listed as a resource for [The Well-Being Toolkit for Lawyers & Legal Employers](#), released July, 2018.
- Mary Vandenack was featured in the American Bar Association's Women of Legal Tech 2018. The Legal Technology Resource Center's Women of Legal Tech initiative is intended to encourage diversity and celebrate women in legal technology. This article can be found at [lawtechnologytoday.org](#).
- "SEC's Proposed Rule Requiring a Customer Relationship Summary" - Mary E. Vandenack, [LISI Employee Benefits & Retirement Planning Newsletter #696](#), June 18, 2018
- "The Impact of Tax Reform On Law Firms" - Mary E. Vandenack, [Law Practice Today Magazine](#), June 14, 2018
- "SEC's Proposed Regulation Best Interest" - Mary E. Vandenack, [LISI Employee Benefits & Retirement Planning Newsletter #695](#), June 18, 2018
- "The Impact of Tax Reform on Law Firms" – Mary E. Vandenack, [Law Practice e-zine](#), June 14, 2018
- "SEC's Proposed Interpretation of Standard of Conduct for Investment Advisers" - Mary E. Vandenack, [LISI Employee Benefits & Retirement Planning Newsletter #694](#), June 5, 2018
- "The Status of the Fiduciary Rule" - Mary E. Vandenack, [metroQuarterly](#), Summer 2018
- "Fifth Circuit's Vacating the Fiduciary Rule" - Mary E. Vandenack, [LISI Employee Benefits and Retirement Planning Newsletter #690](#), April 5, 2018
- "Matter of Scottrade, Inc., Commonwealth of Massachusetts: Massachusetts' Effort to Enforce the Fiduciary Rule" - Mary E. Vandenack, LISI Employee Benefits & Retirement Planning Newsletter #689, March 20, 2018
- "Estate Plan Asset Coordination – Ensuring Your Testamentary Intention" - Mary E. Vandenack, [metroQuarterly](#), Spring 2018
- "Mindful Leadership" - Mary E. Vandenack, [Law Practice Magazine](#), March/April 2018

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- "A Primer on Subpart F on the Internal Revenue Code: Taxation of U.S. Shareholders Owning Interests in Controlled Foreign Corporations" - Mary E. Vandenack, Coauthored with Monte Schatz *The Nebraska Lawyer*, Vol 21, Jan/Feb 2018
- "10 Ways the Tax Overhaul Could Hurt You" – Mary E. Vandenack, LSI Employee Benefits & Retirement Planning Newsletter #120, December 11, 2017
- "Final Regulation on Mortality Tables" – Mary E. Vandenack, LSI Employee Benefits & Retirement Planning Newsletter #684, November 13, 2017
- "Finding and Developing Effective Practice Group Leaders" – Mary E. Vandenack, [Law Practice Magazine](#), Nov/Dec 2017
- "McGaugh v. Commissioner: Seventh Circuit Finds No Taxable IRA Distribution Where Taxpayer Wired Funds to Purchase Stock IRA Custodian Refused to Accept" – Mary E. Vandenack, [LSI Employee Benefits & Retirement Planning Newsletter #679](#), August 7, 2017
- "Leading Through Change" – Mary E. Vandenack, [Law Practice Magazine](#), July/August 2017
- "DNA Pro Ventures: IRS's Disqualification of ESOP Upheld by Tax Court and 8<sup>th</sup> Circuit" – Mary E. Vandenack, LSI Employee Benefits & Retirement Planning Newsletter #676, June 21, 2017
- "Trimmer v. Commissioner: Tax Court Allows Hardship Exception to 60-Day Rollover Requirement" – Mary E. Vandenack, [LSI Employee Benefits & Retirement Planning Newsletter #675](#), June 7, 2017
- "Law Firm Growth: Key Considerations in Expansion" – Mary E. Vandenack, [Law Practice Magazine](#), May/June 2017
- "Saumer v. Cliffs Natural Resources Inc." – Mary E. Vandenack, LSI Employee Benefits & Retirement Planning Newsletter #674, May 3, 2017
- "Wu vs. United States: 7th Circuit Holds Section 408(d)(4) Applies Only to Withdrawal of Contributions Made in a Taxable Year and Withdrawn No Later than the Due Date of the Taxpayer's Tax Return for that Taxable Year" – Mary E. Vandenack, LSI Employee Benefits & Retirement Planning Newsletter #671, March 21, 2017 at <http://www.leimbergservices.com> Copyright 2017 Leimberg Information Services, Inc. (LSI).
- "The Tools & Techniques of Trust Planning" – Mary E. Vandenack, co-written with Stephan R. Leimberg, Jonathon Gopman, Michael Sneeringer, Mary Elizabeth Anderson, Anna Els, L. Paul Hood, Jr., Lester Law, Larry Rivkin, and Yoshimi O. Smith.
- "Asset Protection Trusts" – Mary E. Vandenack, [metroQuarterly](#), Spring 2017
- "Making Technology a Part of Law Firm Culture" – Mary E. Vandenack, [Law Practice Magazine](#), March/April 2017
- "Tools & Techniques of Trust Planning" – Mary E. Vandenack, 17<sup>th</sup> Edition, Contributing Editor, Leimberg Library
- "Ensuring Your Law Firm Is on Course" – Mary E. Vandenack, [Law Practice Magazine](#) Volume 42, Nov/Dec 2016
- "Discounting Rules for Family Limited Partnerships Are Being Revised" – Mary E. Vandenack, [metroQuarterly](#), Nov/Dec/Jan 2016/17
- "Assisting Clients with Gun Trusts" The Nebraska Lawyer, September/October 2016. The article was first published in the LSI Estate Planning Newsletter #2411, May 3, 2016 at <https://www.LeimbergServices.com>. Copyright 2016 Mary E. Vandenack and Leimberg Information Services, Inc. (LSI). Reproduction in Any Form or Forwarding to Any Person Prohibited - Without Express Written Permission.
- "IRS Issues Final Regulations with Respect to How the Minimum Present Value Rules Apply to Defined Benefit Plan Distributions," by Mary E. Vandenack appears in the LSI Employee Benefits & Retirement Planning Newsletter #664, September 27, 2016 at <http://www.leimbergservices.com> Copyright 2016 Leimberg Information Services, Inc. (LSI). Reproduction in Any Form or Forwarding to Any Person Prohibited – Without Express Permission.
- "Leading Innovation" – Mary E. Vandenack, [Law Practice Magazine](#) Volume 42 No 4, July/August 2016
- "Notice 2016-39: Recovery of Investment in the Contract from Payments Received from a Qualified Benefit Plan during Phased Retirement," by Mary E. Vandenack appears in the LSI Employee Benefits

and Retirement Planning Newsletter #658, June 29, 2016 at <http://www.LeimbergServices.com>. Copyright 2016 Leimberg Information Services, Inc. (LISI). Reproduction in Any Form or Forwarding to Any Person Prohibited – Without Express Written Permission.

- “Mary Vandenack and Nicholas Meier: Assisting Clients with Gun Trusts,” LISI Estate Planning Newsletter #2411, May 3, 2016 at <http://www.LeimbergServices.com> Copyright 2016 Leimberg Information Services, Inc. (LISI)
- “Keeping your Estate Planning Up To Date” – Mary E. Vandenack, [metroQuarterly](#), May/June/July 2016
- An AALU Washington Report, WRNewswire 16.04.29: Published by the Association for Advanced Life Underwriting® as part of the Essential Wisdom Series, topic: Tax Court Decides Purported Section 419(e) Plan is Both Deferred Compensation and Split-Dollar
- “IRS Withdraws Proposed Regulations Affecting Nondiscrimination Requirements for Qualified Plans” – Mary E. Vandenack, LISI Employee Benefits and Retirement Planning Newsletter #657, April 25, 2016 at <http://www.LeimbergServices.com> ©Mary E. Vandenack and Leimberg Information Services, Inc.
- “Leading Technological Change in Your Firm” – Mary E. Vandenack, [Law Practice Magazine](#) Volume 45, March/April 2016
- “To Cloud or Not To Cloud?” – Mary E. Vandenack, [Law Practice Magazine](#) Volume 45, March/April 2016
- “Directed Trusts for Special Situations” – Mary E. Vandenack, [metroQUARTERLY](#), Feb/Mar/Apr 2016
- “The ABA Commission on the Future of Legal Services” – Mary E. Vandenack, [Law Practice Magazine](#) Volume 42 Number 1, Jan/Feb 2016
- “Charitable Giving Strategies to Benefit Charity and Get a Tax Deduction” – Mary E. Vandenack, [metroQUARTERLY](#), Feb/Mar/Apr 2015
- “Caring for a Disabled Beneficiary: Third-Party Special Needs Trust” – Mary E. Vandenack, [metroQUARTERLY](#), Nov/Dec/Jan 2014/15
- “Mary Vandenack & Dan Wintz: Drafting Considerations for the Third-Party Spendthrift Trust after In re Castellano,” LISI Asset Protection Planning Newsletter #259, September 10, 2014 at <http://www.LeimbergServices.com> Copyright 2014 Leimberg Information Services, Inc. (LISI).
- “Estate Planning With IRAs: Inherited IRAs Are Not Protected From Creditors” – Mary E. Vandenack, [metroQUARTERLY](#), Aug/Sept/Oct 2014
- “Mary E. Vandenack: Reconsidering the Design of Trusts Used as IRA and Qualified Account Beneficiaries Post-Clark,” LISI Asset Protection Planning Newsletter #252, July 7, 2014 at <http://www.LeimbergServices.com> ©Mary E. Vandenack 2014.
- “Mary Vandenack & Assisting Clients in Avoiding Potential Creditors: What Actions Can an Attorney Take?” LISI Asset Protection Planning Newsletter #246, June 9, 2014 at <http://www.LeimbergServices.com> ©Mary E. Vandenack 2014.
- “Hiring a Marketing Director for Small or Midsized Firms” – Mary E. Vandenack, [Law Practice Magazine](#), Volume 40 Number 3, May/June 2014
- “Protecting Your Rights to Intellectual Property” – Mary E. Vandenack, [metroMAGAZINE](#), May 2014
- “[Protecting Your Intellectual Property](#)” – Mary E. Vandenack, Coauthored with Joshua A. Diveley, March 2014
- “Pros & Cons of Portability in Estate Planning” – Mary E. Vandenack, [metroMAGAZINE](#), March 2014
- “Tax Planning for Real Estate Investors and Professionals Considering the Net Investment Income Tax and Additional Self Employment Tax” – Mary E. Vandenack, [metroMAGAZINE](#), January 2014
- “2013 Year End Tax Planning” – Mary E. Vandenack, [metroMAGAZINE](#), November 2013
- “Preventing Theft and Fraud Within Your Law Firm” – Mary E. Vandenack, [Law Practice Magazine](#), Volume 39 Number 5, September/October 2013
- “Who Are Your Children & Descendants? Your Will in a Time of Unique Parental Situations” – Mary E. Vandenack, [metroMAGAZINE](#), September 2013
- “Venture Capital Investments in Legal Services” – Mary E. Vandenack, [Law Practice Magazine](#), Volume 39 Number 4, July/August 2013
- “Business Fraud and Theft Prevention” – Mary E. Vandenack, [metroMAGAZINE](#), July 2013

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- “Gun Trusts: For Gun Owners or Those Considering Purchasing a Gun” – Mary E. Vandenack, [metroMAGAZINE](#), May 2013
- “Estate Planning After ‘ATRA’” – Mary E. Vandenack, [metroMAGAZINE](#), March 2013
- “New Medicare Tax Applies in 2013: Strategies for Minimizing the Cost” – Mary E. Vandenack, [metroMAGAZINE](#), January 2013
- “Making the Decision To Make a Change” – Mary E. Vandenack, [Law Practice Magazine](#), Volume 39 Number 1, January/February 2013
- “Dawn of a New Business Model. What Morningstar teaches us about law firm management” – Mary E. Vandenack, [Law Practice Magazine](#), Volume 39 Number 1, January/February 2013
- “Building on Key Capital: Your Current Clients” – Mary E. Vandenack, [Law Practice Magazine](#), Volume 38 Number 6, November/December 2012
- “Asset Protection Planning Trusts” – Mary E. Vandenack, [metroMAGAZINE](#), January 2012
- “Year End Tax Planning Tips” – Mary E. Vandenack, [metroMAGAZINE](#), November 2011
- “Estate Planning Under the Tax Relief Act of 2010” – Mary E. Vandenack, [metroMAGAZINE](#), March 2011
- “The Mini Private Foundation” – Mary E. Vandenack, [metroMAGAZINE](#), January/February 2011
- “Another New Tax Act: Small Business Jobs Act of 2010” – Mary E. Vandenack, [metroMAGAZINE](#), November 2010
- “Your Will if You Have No Will” – Mary E. Vandenack, [metroMAGAZINE](#), September 2010
- “Advance Directives Options in Nebraska” – Mary E. Vandenack, [metroMAGAZINE](#), July 2010
- “Health Care Reform and You” – Mary E. Vandenack, [metroMAGAZINE](#), May 2010
- “Insuring a Key Asset: Your Stream of Income” – Mary E. Vandenack, [metroMAGAZINE](#), March 2010
- “Year-end Tax Thoughts: Estate Planning” – Mary E. Vandenack, [metroMAGAZINE](#), November 2009
- “Asset Protection” – Mary E. Vandenack, [metroMAGAZINE](#), September 2009
- “American Recovery & Reinvestment Act of 2009” – Mary E. Vandenack, [metroMAGAZINE](#), May 2009
- “Estate Planning During Economic & Tax Uncertainty” – Mary E. Vandenack, [metroMAGAZINE](#), January 2009
- “Estate Planning Basics” – Mary E. Vandenack, [metroMAGAZINE](#), November 2008
- “Planning for the Disabled Beneficiary: The Special Needs Estate Plan” – Mary E. Vandenack, [metroMAGAZINE](#), October 2008
- “The Family Foundation for Charitable Giving” – Mary E. Vandenack, [metroMAGAZINE](#), September 2008
- “Employer-Provided Autos Can Benefit Employers,” *23 Taxation for Lawyers* 137, 1994
- “The Entertainment Facility Rules of Section 274 and Corporate-Owned Condominiums,” *9 Akron Law Review* 1, 1992
- Casenote: “Holland v. Illinois, The Impartiality Requirement of the Sixth Amendment and Peremptory Challenges,” *25 Creighton Law Review* 313, 1990

## Speaking Engagements, Presentations, and Instruction

- Speaker – December 27, 2022 – “Review of the Proceedings from the 80<sup>th</sup> Annual NYU Federal Institute on Taxation” – [LISI Webinar](#)
- Speaker – November 8, 2022 – “Ethical Issues In Trusts and Estates Practice” – Wealth Counsel Thought Leaders Series
- Speaker – October 25, 2022 – “Technology, Innovation, Trusts, and Estates With Ethics – Building a Forward Thinking Ethically Compliant Client Service Oriented Life Balanced Law Firm” – The Digital Trust and Estate Forum
- Speaker – September 23, 2022 – “Mindfulness in the Modern World” – ABA RPTE Leadership Meeting
- Speaker – September 21, 2022 – “How to Give and Get the Most Out of Mentoring in Today’s Hybrid World” – ABA Women Rainmakers Webinar
- Speaker – August 5, 2022 – “Considerations from NYU Advanced Trusts and Estates Proceedings” – [LISI Webinar](#)
- Speaker – May 25, 2022 – “Enhancing Success with Healthy Boundaries” – Women of Legal Tech

## Mary E. Vandenack Curriculum Vitae

- Speaker – May 18, 2022 – Interview by [DotCom Magazine](#)
- Speaker – April 29, 2022 – “Mindfulness” – ABA RPTE Spring Leadership Meeting, Dallas, Texas
- Speaker – April 22, 2022 – “Mary Vandenack and Abigail O’Connor’s Review of Proceedings of the 56<sup>th</sup> Heckerling Institute on Estate Planning” - [LISI Webinar](#)
- Speaker – January 20, 2022 – “Estate Planning, IRAs, & Trusts” – Society of FSP, Omaha Chapter
- Speaker – October 13, 2021 – “Future Implications from the 8th Circuit Court Holding in Strope-Robinson v. State Farm” – Nebraska State Bar Association annual meeting
- Speaker – June 21, 2021 – Mary Vandenack on [metroTV](#) – Interview by Andee Hoig, Publisher, metroMagazine
- Speaker – April 22, 2021 – “Managing Your Law Firm Through Change” – [the digital edge](#) podcast with Jim Calloway and Sharon Nelson
- Speaker – February 16, 2021 – “Mindfulness” – [metroTV](#) – Interview by Andee Hoig, Publisher, metroMagazine
- Speaker/Presenter – January 28, 2021 – “Third Party Trusts as Asset Protection Tools” - [WealthCounsel®](#)
- Speaker/Presenter – January 12, 2021 – “Best Technologies for Practice Development” – Trust & Estates Virtual Forum with Martin Shenkman
- Speaker/Presenter – October, 2020 – “Intersection of Estate Planning and Marital Planning” – [Nebraska State Bar Association](#) with Hannah Sommers
- Speaker/Presenter – September 30, 2020 – “8 Tech Traps and Tips Every Practitioner Must Know Now that You’ve Tackled Remote Working” – [Peak Trust Company & InterActive Legal Webinar](#) with Peter Fidler, Jonathon Blattmachr, and Martin Shenkman
- Speaker/Presenter – August 25, 2020 – “Best Practices for Preserving Client Intentions in Wealth Transfers” - [WealthCounsel®](#)
- Moderator – June 17, 2020 – “The New PPP Timeline and Other Issues for Reopening Businesses” Webinar for [Vandenack Weaver](#) ([recording continued](#))
- Moderator – May 15, 2020 – “Branding and Networking of Successful Women Attorneys: How did she do that?” – Webinar for 32<sup>nd</sup> Annual RPTE National CLE Conference
- Speaker/Presenter – May 14, 2020 – “Tech and Remote Work: More Practical and Actionable Tips You Can Take Now!” – [Peak Trust Company & InterActive Legal Webinar](#) with Jonathon Blattmachr, Martin Shenkman and Barron Henley
- Speaker/Presenter – April 27, 2020 – “Tech, Remote Work, and More: What Estate Planners Need to Know Now” – [Peak Trust Company & Interactive Legal Webinar](#) with Jonathon Blattmachr, Martin Shenkman and Barron Henley
- Moderator – April 2, 2020 – “Update on Cares Act and Paycheck Protection Loans” – Webinar for [Vandenack Weaver](#)
- Moderator – March 30, 2020 – “Navigating Business Responses to COVID-19 Legislation” – Webinar for [Vandenack Weaver](#)
- Moderator – March 24, 2020 – Avoiding Employment Litigation Webinar Series #4 – Harassment/#MeToo – Vandenack Weaver Webinar
- Speaker/Presenter- February 26, 2020- "A Straightforward Approach to a Path in Legal Technology for Women"- ABA Women Rainmakers presenting Women of Legal Tech Summit 2020
- Speaker/Presenter- February 21, 2020- "Rethinking Disposition of Trusts at Certain Ages: Approaches to Trust Design with an Asset Protection Focus" - Annual Creighton Law Review Symposium and Tepoel Lecture
- Moderator/Presenter – January 28, 2020 – “Ready for Process Automation? Start by Developing Checklists and Maps” - Best of ABA TECHSHOW Webinar
- Moderator - October 17, 2019 - Avoiding Employment Litigation webinar series
- Speaker - May 14, 2019 - "The Future of Estate Planning Practice" - Webinar for Purposeful Planning Institute
- Speaker/Presenter – May 3, 2019 – “50 Lessons for Women Lawyers” – New York State Bar Association

Mary E. Vandenack Curriculum Vitae

- Speaker/Presenter – April 16, 2019 – “Preserving Client Testamentary Intent” – Presentation at Omaha Estate Planning Council Breakfast Meeting
- Speaker/Presenter – March 28, 2019 – “Avoiding Erosion of Testamentary Intent via Contractual Designation” – Presentation at the Society of Financial Service Professionals March 2019 Breakfast Meeting
- Co-Presenter – March 7, 2019 – “Using Tech to Improve and Grow Your Estate Planning Practice – Part 2” – Webinar with Martin Shenkman
- Speaker/Presenter – February 28, 2019 – “Process Automation Phase One: Developing Checklists and Maps” – ABA Techshow 2019 Presentation
- Speaker/Presenter – February 28, 2019 – “Next Generation Technology for the Solo and Small Firm” – ABA Techshow 2019 Presentation
- Speaker/Presenter – February 27, 2019 – “Designing the Law Firm of the Future: Diversity, Inclusion, Technology, and Innovation” – Women of Legal Tech Presentation
- Presenter – January 29, 2019 – “Using Tech to Grow Your Estate Planning Practice” - Webinar
- Speaker/Presenter – December 2018 – “Profitable Alternative Fees for the Process Oriented Lawyer” - OBA End of the Year CLE Presented by OBA Lawyer Referral Service
- Speaker/Presenter – September 2018 – ABA Presentation “Future Proofing Your Law Firm”
- Presenter/Panelist – September 13, 2018 - ABA Webinar: CE1809SFP Affordable Technology for Solo and Small Firm Productivity
- Co-Speaker – July 10, 2018 – “Understanding What the 2017 Tax Reform Means to Your Firm” – Webinar for the Massachusetts Bar Association
- Speaker – ABA RPTE Symposium – May 2018 - “Moving? Can I Take It with Me? Can I Use Something New? State Law Exemptions Under the Microscope”
- Moderator – ABA RPTE COP Program – May 2018 – “Essential Lawyering Skills for Today”
- Speaker – ABA Webinar – April 2018 – “Understanding What Tax Reform Means For You – 199A”
- Speaker – Law Talk Network – April 2018 – “Technology for the Small and Solo Firm”
- Speaker – Creighton University School of Law Trusts & Estates Class – April 2018 – “Gun Trusts”
- Speaker – ABA Techshow 2018 – March 2018 – “Affordable Technology for the Solo and Small Firm”
- Speaker – ABA Techshow 2018 – March 2018 – “Alternative Fees for the Process Oriented Law Firm”
- Speaker – ABA Techshow 2018 – March 2018 – “Mindful Leadership for Innovation and Technology”
- Speaker – Lawpact Futures Conference – November 2017 – “The Future of Legal Services”
- Speaker – ABA RPTE Symposium – April 2017 – “Contract Based Wealth Transfers & Erosion of Testamentary Intent”
- Speaker – ABA Techshow 2017; “When Law Firms Merge”; “Panel Presentation: Future of Legal Services”; “Facilitator Trusts and Estates Community”; “Yoga for Technologists”; “Mindful Meditation”
- Speaker – “Alternative Fee Arrangements” for ABA RPTE Non-Tax Issues Committee Teleconference February 2017
- Speaker – “Analysis of the ABA Report on the Future of Legal Services” Podcast, Jim Calloway’s Law Practice Tips Blog October 2016
- Speaker – “Small Firms/Big Markets” Omaha Legal Professionals Association October 2016
- Speaker – “Implementing Alternative Billing in your Law Practice” Legal Talk Network, New Solo Podcast October 2016
- Speaker – “Small Firms/Big Markets” ISA and NSA Solo and Small Firm Conference August 2016
- Speaker – “Alternative Fees: Making Them Profitable” ISA and NSA Solo and Small Firm Conference August 2016
- Speaker – “Small Firms/Big Markets” ABA Techshow, March 2016
- Speaker – “How to Compete with IBM Watson JD: Future-proof your practice by improving efficiency now – Part 1” ABA Law Practice January 2016
- Speaker – “Business Succession Planning – Omaha Network January 2016
- Speaker – “Technology in Law Practice: The Good, the Bad, and the Ugly” Omaha Bar Assn Dec 2015

## Mary E. Vandenack Curriculum Vitae

- Speaker – “Estate Planning for Farmers” Hertz Management November 2015
- Speaker – Future of Legal Services Panel, ABA Law Practice Spring Meeting June 2015
- Speaker – “How to Have a Full Plate in Life without dropping anything off” College of Saint Mary Honor Student Program January 2015
- Speaker – “Legal Issues for Businesses,” Midlands National Management Association, May 2008
- Speaker – “Medical Records Guide,” Medical Group Presentations, 2008
- Speaker – “Charitable Giving Considerations,” Charitable Organization Presentations, 2005
- Speaker – “Estate Planning Guide,” – Medical Group Presentations, 2005
- Speaker - “Retirement Plan Design Considerations,” Firm Seminar, 2004
- Speaker - “Estate Planning for Farm Assets,” Hertz Farm Management, Fall 2003
- Speaker – “HIPAA Basics,” Medical Group Presentations, 2003
- Speaker - “Estate Planning Considerations,” Saint Stephen the Martyr Catholic Church, Spring 2003
- Speaker - “Estate Planning In Changing Times,” Archdiocese of Omaha, Fall 2002
- Speaker - “Charitable Giving Strategies,” Wahoo Neumann Schools, Fall 2001

## Other Publications

- "A mental health issue Does Not Mean A Person Is legally incompetent" – Mary E. Vandenack, [metroMAGAZINE](#), January/February 2023
- "Making relationship changes in a Positive Fashion- Leave blessings, not wounds" – Mary E. Vandenack, [metroMAGAZINE](#), January/February 2023
- “Diversity, Equity & Inclusion”, – Mary E. Vandenack, [metroMAGAZINE](#), Nov/Dec 2022 issue
- “Words can create Well-being”, – Mary E. Vandenack, [metroMAGAZINE](#), Nov/Dec 2022 issue
- "Finding Connections: Mary Vandenack Bridges Wellness and Law", [Midlands Business Journal](#), November 4, 2022
- “When life is challenging, surround yourself with love” – Mary E. Vandenack, [metroMAGAZINE](#), July/August 2022
- “Consider Positive Intent”, [metroMAGAZINE](#), April 13, 2022
- “Legal Trends and Practice Management - Be Ahead of the Curve of Pandemic Induced Trends in Healthcare”, Metro Omaha Medical Society, April 1, 2022
- “The Value of Saying ‘I’m sorry’”, [metroMAGAZINE](#), February 27, 2022
- “Kindness”, [metroMAGAZINE](#), November 3, 2021
- “Renaissance Woman Mary Vandenack Weaves Legal, Wellness, Tech, and Teaching Passions”, [Midlands Business Journal](#), October 8, 2021
- “Gaslighting: Protect Yourself With a Strong Sense of Self”, [metroMAGAZINE](#), September 2021
- “Identifying Unsafe People”, [metroMAGAZINE](#), The Women’s Issue, July, 2021
- “Meditation to Build Emotional Intelligence”, [metroMAGAZINE](#), February, 2021
- “Rediscovering Yoga (and Thoughts on Yoga for the Non-Yogi)” [metroMAGAZINE](#), August/September 2020
- “Gratitude Practice” [metroMAGAZINE](#), June/July 2020
- “What Has Covid-19 Taught us About Resilience”, [metroMAGAZINE](#), April 2020
- “Choose Well: How You Spend Time and Who You Spend It With” – [metroMAGAZINE](#), February 2020
- “The Power of Our Words: Kind and Encouraging Words can Change Lives” –[metroMAGAZINE](#) Dec 2019
- "Make the First Appointment of the Day with Yourself" - [metroMAGAZINE](#) October 2019
- “50 Lessons for Women Lawyers - From Women Lawyers: Career and Life Lessons From 50 Successful Women Lawyers”, May 2019
- “Building Resilience”, [metroMAGAZINE](#) April 2019
- “Modern Mindfulness vs Digital Detox,” [metroMAGAZINE](#) February 2019
- “Tips for Being a Peacemaker”, [metroMAGAZINE](#) December 2018
- “Emotional Intelligence”, [metroMAGAZINE](#) October 2018
- “Practicing Gratitude”, [metroQUARTERLY](#) August 2018

Mary E. Vandenack Curriculum Vitae

- “Practicing Mindfulness to Enhance Leadership Skills” – Summer 2018 [metroQUARTERLY](#)
- “Authentic Friendships” – Spring 2018 [metroQUARTERLY](#)
- “Filling our Life with Healing Friends and Safe People” Nov/Dec/Jan 2018 [metroQUARTERLY](#)
- “Peaceful, Safe, Caring Relationships” Aug/Sept/Oct 2017 [metroQUARTERLY](#)
- “A Good Time to Remember Kindness,” May/June/July 2017 [metroQUARTERLY](#)
- “Finding Ways to Inspire Others to Positive Action,” Feb/March/April 2017 [metroQUARTERLY](#)
- “Update: Mindfulness Revisited,” Nov/Dec/Jan 2017 [metroQUARTERLY](#)
- “Eating Clean: Healthier Options” Aug/Sept/Oct 2016 [metroQUARTERLY](#)
- “Mindful Eating: Summer Fresh” May/Jun/Jul 2016 [metroQUARTERLY](#)
- “Mindfulness: Tips for Beginning” Feb/March/April 2016 [metroQUARTERLY](#)
- “Mindfulness: Just the Beginning,” Nov/Dec/Jan 2015/16 [metroQUARTERLY](#)
- “Self Compassion: Embracing Our Humanity,” Aug/Sept/Oct 2015 [metroQUARTERLY](#)
- “Health Thoughts to Keep Omaha Thriving,” Feb/Mar/Apr 2015 [metroQUARTERLY](#)
- “Making a Difference for Those With Mental Health & Substance Abuse Issues,” Nov/Dec/Jan Winter 2014 [metroQUARTERLY](#)
- “Tips for Practicing Compassion”, Aug/ Sept/Oct 2014 [metroQUARTERLY](#)
- “Tips for Being More Positive,” June 2014 [metroMAGAZINE](#)
- “Spring Cleanse for the Mind,” May 2014 [metroMAGAZINE](#)
- “Saying ‘Yes’ With Impact and ‘No’ More Frequently,” April 2014 [metroMAGAZINE](#)
- “Renew Your Vitality – Celebrating Spring,” March 2014 [metroMAGAZINE](#)
- “Practicing Loving Kindness,” February 2014 [metroMAGAZINE](#)
- “Making a Difference in 2014,” January 2014 [metroMAGAZINE](#)
- “’Tis the Season for Family, Friends, Kindness, Gratitude and Appreciation,” December 2013 [metroMAGAZINE](#)
- “Thriving Through the Holidays,” November 2013 [metroMAGAZINE](#)
- “A Healthy Holiday Plan: Creating the Extraordinary,” October 2013 [metroMAGAZINE](#)
- “A Candy Bar Is Not a Treat...Being Healthy Is,” September 2013 [metroMAGAZINE](#)
- “Breaking the Sugar Habit,” August 2013 [metroMAGAZINE](#)
- “Developing the Whole-food Habit,” July 2013 [metroMAGAZINE](#)
- “High Vibration Foods: Eating for Health,” June 2013 [metroMAGAZINE](#)
- “Spring Renewal,” May 2013 [metroMAGAZINE](#)
- “Support Systems Matter: Check in on Yours,” April 2013 [metroMAGAZINE](#)
- “Helping Others Help You,” March 2013 [metroMAGAZINE](#)
- “Creating More Love in Your Life,” February 2013 [metroMAGAZINE](#)
- “2013: Renewal Resolutions,” January 2013 [metroMAGAZINE](#)
- “Tapas: Energy of Change,” October 2011 [metroMAGAZINE](#)
- “Santosh: Contentment,” September 2011 [metroMAGAZINE](#)
- “Saucha: How We Treat Ourselves,” August 2011 [metroMAGAZINE](#)
- “Aparigraha: Letting Go,” July 2011 [metroMAGAZINE](#)
- “Asteya: Balancing Energy,” June 2011 [metroMAGAZINE](#)
- “Satya: Truthfulness,” May 2011 [metroMAGAZINE](#)
- “Wellness Adventure: Create a Wellness Adventure in Your Life This Spring,” April 2011 [metroMAGAZINE](#)
- “Ahimsa: Non-violence,” March 2011 [metroMAGAZINE](#)
- “Living Single,” January/February 2011 [metroMAGAZINE](#)
- “Loving Kindness,” December 2010 [metroMAGAZINE](#)
- “The Season of Gratitude,” November 2010 [metroMAGAZINE](#)
- “The Center of the Circle,” October 2010 [metroMAGAZINE](#)
- “My Life Is My Artwork,” September 2010 [metroMAGAZINE](#)
- “The Tastes of Food,” August 2010 [metroMAGAZINE](#)
- “Walk It Off,” July 2010 [metroMAGAZINE](#)

## Mary E. Vandenack Curriculum Vitae

- “The Food Meditation,” June 2010 [metroMAGAZINE](#)
- “New Life,” May 2010 [metroMAGAZINE](#)
- “Yoga As the Antidote to Being Stuck,” April 2010 [metroMAGAZINE](#)
- “Food Rules for Spring,” March 2010 [metroMAGAZINE](#)
- “Love Is a Verb,” February 2010 [metroMAGAZINE](#)
- “Meta-Commitments,” January 2010 [metroMAGAZINE](#)
- “A Holiday Gift to Consider for Yourself,” December 2009 [metroMAGAZINE](#)
- “Rethinking the Term ‘Treat’,” November 2009 [metroMAGAZINE](#)
- “Pilates: Change the Way You Move and Live,” October 2009 [metroMAGAZINE](#)
- “Top 10 Fall Vegetables,” September 2009 [metroMAGAZINE](#)
- “Joy in Daily Living: Connecting With Your Own Soul,” August 2009 [metroMAGAZINE](#)
- “Turning Resolutions Into Reality,” December 2008 [metroMAGAZINE](#)

## Legal Visionaries Podcasts

- Business and Tax Considerations Before Selling – Guest: Mike Weaver – July 20, 2021
- Non-Disclosure Agreements When Selling Your Business – Guest: Mike Weaver – July 27, 2021
- Enhancing Your Brand in Anticipation of Selling – Guest: Cheri Duryea – August 3, 2021
- The Inner and Outer Game of Leadership – Guest: Pam Hernandez – August 10, 2021
- Private Foundations – Guests: Mike Weaver and Mark Weber – August 17, 2021
- Comprehensive Estate Planning Through Professional Collaboration – Guest: Brady Marlow – August 24, 2021
- Current Trends in Healthcare Law – Guest: Stephanie Sharp – August 31, 2021
- Managing Your Client List – Guest: Allison Shields Johs – September 7, 2021
- Dynasty Trusts – Guest: Lara Sass – September 14, 2021
- Gaslighting in the Workplace – Guest: Pam Hernandez – September 21, 2021
- Considerations When Selecting a Trustee – Guest: Sarah Duey – September 28, 2021
- What’s New with Microsoft 365 – Guest: Ben Schorr – October 5, 2021
- Incapacity Planning – Guests: Rachel Truhlsen and Emily Pattison – October 12, 2021
- Future Issues For Law Practices – Guest: Reid Trautz – October 19, 2021
- Estate Planning for Agricultural Clients – Guests: Bryan Holen and Monte Schatz – October 26, 2021
- Trust Strategies for the Business Exit – Guest: Mike Weaver – November 9, 2021
- Legislative Proposals and Year End Tax Planning for 2021 – Guests: Marty Shenkman and Jonathan Blattmachr – November 16, 2021
- Cybersecurity – Guest: Ben Schorr – November 23, 2021
- The Ins and Outs of Earn Out Agreements – Guests: Evan Levine and Nainesh Shah – November 30, 2021
- Effective Use of LinkedIn for Lawyers – Guest: Allison Shields Johs – December 7, 2021
- Year End Tax Planning for 2021 – Guest: Mike Weaver – December 14, 2021
- Wellbeing Tips for Lawyers – Guest: Heidi Alexander – December 21, 2021
- Legacy Aspect of Business Exits – Guests: Rob Wellendorf and Mike Weaver – December 28, 2021
- Importance of Law Firm Culture for Wellbeing – Guest: Pam Hernandez – January 4, 2022
- Future Proofing Your Law Firm – Guest: Reid Trautz – January 18, 2022
- Leaving Corporate America To Start Your Own Business – Guest: Stephanie Sharp – January 25, 2022
- Nutrition’s Role In Wellness – Guest: Nikki Kendall – February 1, 2022
- Life Care Planning Model – Guest: Rachel Truhlsen – February 15, 2022
- Family Limited Partnerships – An Estate Planning Strategy – Guest: Lara Sass – February 22, 2022

## Mary E. Vandenack Curriculum Vitae

- Collaborative Planning in Business Exits - Guests: Rob Wellendorf and Mike Weaver – March 1, 2022
- Incorporating Charitable Giving into your Estate Plan - Guests: Mike Weaver and Mark Weber – March 8, 2022
- Using an ESOP as a Business Exit Strategy – Guest: Mike Weaver – March 22, 2022
- Mindfulness in Decision making – Guest: Brady Marlow – March 29, 2022
- The Concept of “Both/And” in Estate Planning – Guest: Vanessa Kanaga – April 5, 2022
- Five Behaviors of An Effective Team – Guest: Cheryl Kuhn – April 11, 2022
- Common Trust and Estate Litigation – Guest: Bonnie Boryca – April 19, 2022
- The Benefits of Practicing Mindfulness – Guest: Dr. Inna Khazan – April 26, 2022
- Health Care Directive Issues – Guest: Michael Sneeringer – May 3, 2022
- Tools For Effective Team Building – Guest: Cheryl Kuhn – May 10, 2022
- New Taxpayer Adverse Clawback Regulations – How Will They Affect Your Clients? – Guest: Jonathan Blattmachr – May 17, 2022
- Biofeedback and Mindfulness – Guest: Dr. Inna Khazan – May 24, 2022
- Income Tax Planning – Guest: Jonathan Gopman – May 31, 2022
- Why Her and Not Me – Guest: Janet Falk – June 7, 2022
- Section 1202 Strategies – Guest: Lara Sass – June 14, 2022
- Improving your Marketing ROI – Guest: Janet Falk – June 21, 2022
- Unique Challenges in Estate Planning for Physicians – Guest: Stacie Neussendorfer – June 28, 2022
- Strategic Networking – Guest: Carol Schiro Greenwald – July 5, 2022
- Estate Planning for Cryptocurrency – Guest: Lara Sass – July 12, 2022
- Sports Analogies for Estate Planning – Guest: Ross Polking – July 19, 2022
- Then and Now – Divorce and Estate Planning – Guest: Sharon Klein – July 26, 2022
- Maximizing Client Relationships to Grow Practice – Guest: Carol Shiro Greenwald, PhD – August 2, 2022
- Taxation of Aircraft – Host: Rachel Truhlsen; Guest: Mary Vandenack - August 9, 2022
- Common Estate Planning Strategies for Physicians – Guest: Stacie Neussendorfer – August 23, 2022
- Building a Trust and Estate Planning Practice in Alaska and Anywhere – Guest: Abigail O’Connor – August 30, 2022
- Legal Issues Related to Aging – For Everyone – Guest: Rachel Truhlsen – September 6, 2022
- Intersection of Marital Law and Estate Planning – Guest: Sharon Klein September 20, 2022
- Law Firm CFO Expectations – Guest: Terrell Turner – September 27, 2022
- Private Family Trust Companies – Host: Rachel Truhlsen; Guest: Mary Vandenack - August 9, 2022
- Leadership: Upgrade Your Operating System – Guest: Anne Collier - October 11, 2022
- How to Find a Buyer for Your Business – Guest: Ken Hachikian – October 18, 2022
- Fiduciary Issues in Estate Planning – Guest: Ross Polking – October 25, 2022
- Asset Protection for Accumulated Wealth – Host: Rachel Truhlsen; Guest: Mary Vandenack – November 1, 2022
- “I’m Not my Father: Taking on the Family Business.” – Guest: Andrea Hoig – November 8, 2022
- Family Office - Host: Cheri Duryea; Guest: Mary Vandenack – November 15, 2022
- Supercharge Your Culture – Guest: Anne Collier – November 22, 2022
- Diversity and Wellness - Guest: Denise Robinson – November 29, 2022
- Estate Tax Planning after the 2022 Elections – Guests: Jonathan Blattmacher and Martin Shenkman – December 5, 2022
- Premium Financing – Guest: Darin Duin – December 13, 2022

## Mary E. Vandenack Curriculum Vitae

- Key Things Law Firms Can Do to Grow Profits – Guest: Terrell Turner – December 20, 2022
- Ethical Rules Need to Change – Guest: Dan Siegel – December 27, 2022
- Integrative Healthcare for Wellbeing – Guest: Dr. Jaime Dodge – January 3, 2023
- Business Prenups – Guest: David Campbell – January 10, 2023

## Editorial Roles

- Law Practice Magazine
  - Editor-in-Chief, 2018 - 2020
  - Features Editor, 2013-2016
  - Assistant Features Editor, 2012-2013
  - Editorial Board, 2011-present
- Nebraska Lawyer - Issue Editor, various times
- Creighton Law Review - Editor in Chief, 1992

## Community Associations, Board Service

- Nationwide Gift Planning Advisory Council – 2022 to present
- Women Investing in Nebraska 2020 to present
- Boystown Advisory Board, March 2017-present
- Wellbeing Partners – TPC Committee 2021 to present
- Creighton University Law School Advisory Board, May 2017 to present
- Member, Creighton University Mentoring Program
- TABS Board, 2012 to present
- American Heart Association
  - Circle of Red, 2011-present – Executive Distinction
  - Executive Committee, Go Red For Women, 2012-2014
- SAC Federal Credit Union
  - Supervisory Committee and Budget Committee, March 2017-May 2018
- Omaha Chamber of Commerce
  - BOSS Group
  - Health Care Council
- Omaha Network, 2011-2020
- Hope Lodge Mission Advancement Council, 2011–2017
- Nebraska Cancer Coalition Board of Directors, 2010–2016
- Armbrust YMCA
  - Board of Directors, 2008–2012
  - Chair, Strong Kids Campaign, 2008
- Wellbound Fitness Advisory Board, 2004-2006
- New Cassel Retirement Center Finance Committee, 2002-2004
- Saint Stephen the Martyr
  - Development Campaign Leader, 2002
  - Finance Board, 1994-2004
- American Council on Exercise, 2000-present
- Yoga Alliance – 300 hour RYTE, 2008-present
- Jaybackers, 1993-present
- Millard Business Association, 2005-2017
- Omaha Women’s Fund
- Former Member Rotary International, Suburban Chapter

## Professional Associations, Memberships, and Activities

- American College of Trust and Estate Council 2020 to present
  - Asset Protection Committee
  - Technology Committee
  - Artificial Intelligence Task Force
- American Bar Association
  - ABA SCOTIS 2018 - present
  - ABA Commission on the Future of Law Practice 2014 – 2016
  - ABA Commission on Youth at Risk, 2013-2016
  - American Bar Association Foundation – Fellow, 2014 to present
  - ABA Law Practice Division
    - Law Practice Division Council 2014 to present
    - Law Practice Vice Chair 2022-2023
    - *Law Practice Magazine* Senior Editorial Board –2011 to present
      - Vice Chair 2013-2014
      - Chair 2018 to 2020
    - Women Rainmakers – Board of Directors, 2011-present
    - Author – Law Practice Magazine Leadership Column – 2016 to 2018
    - Evolving Business Models Task Force, 2014-2015
    - Resolutions Committee – Vice Chair, 2014-2015
    - Futures Initiative – Vice Chair 2015-16
  - ABA Real Property Trusts & Estates Section
    - Joint Law Practice Management Group – Group Co-Chair 2018 to 2020
    - Futures Task Force - Co-Chair 2016-2019
    - ABA RPTE Small Firms Committee - Vice Chair, 2015-2019
    - ABA RTPE Economics of Practice & Technology – Chair 2016-2019
    - Planning Committee – 2017 to 2023
    - Asset Protection Planning Committee – Vice Chair 2018
    - Council – 2020 to present
    - Trust and Estate Division Assistant Secretary 2019
  - ABA Sections on Taxation, Business Law, International Law, Health Care Law
- Nebraska State Bar Association
  - Legislative Committee 2020 to present
  - Foundation Fellow, 2015
  - Member of Sections on Real Property, Trust and Probate Law, and Business Law
  - Past Service to Lawyers' Assistance Implementation Committee; Publications Committee; Women and the Law Section; Officer of Business Law Section
- Michigan Bar Association
- American Professional Responsibility Lawyers
- Omaha Estate Planning Council
- Omaha Bar Association
  - Medical/Legal Committee, 2004-2005
  - Domestic Violence Committee, 2003-2005
- American Health Lawyers Association
- Medical Group Management
- Scribes: The American Society of Legal Writers
- Health Care Compliance Association
- Chair, Nebraska Women's Bar Association, 2002
- Alpha Sigma Nu Jesuit Honor Society
- Phi Delta Phi Legal Fraternity
- Uniform Law Commission Observer

## Bar Admissions/Courts

- Nebraska, 1992
- U. S. District Court, District of Nebraska, 1992
- Michigan, 2007
- U.S. Court of Appeals, Seventh Circuit, 2016
- U.S. Court of Appeals, Eighth Circuit, 2016
- U.S. Tax Court, 2016

## Honors and Features

- “Women in Business” – Midlands Business Journal – November 22, 2022
- Nebraska State Bar Association Lifetime Fellow 2022
- “Women Who Rock” – Midlands Business Journal - October 8, 2021
- American Bar Foundation Lifetime Fellow 2016
- [Marquis Who’s Who Biographical Registry](#), February 22, 2022
- Martindale-Hubbell Preeminent – Peer Rated for Highest Level of Professional Excellence 2020
- Recognized by Best Lawyers 2019, 2020, 2021, 2022
- Selected for recognition in the 2019 25<sup>th</sup> Edition of *The Best Lawyers in America*® for work in Trusts and Estates.
- Chartered Advisor in Philanthropy®, February 2019
- Identified as a resource for The Well-Being Toolkit for Lawyers & Legal Employers, which released in July 2018.
- Best Lawyers – Omaha Magazine, March/April 2018
- [2018 AIOLC’s 10 Best in Nebraska for Client Satisfaction](#), The Estate Planning Division – The American Institute of Legal Counsel, December 2018
- ABA [LTRC Distinguished Women of Legal Tech](#) 2018
- SmallLaw’s Pick of the Week Award for the article, “[The Impact of Tax Reform On Law Firms](#)”, July 2018
- College of Law Practice Management – Inducted 2017
- Lawyers of Executive Distinction – Trusts & Estates – Lawyers of Distinction, June 2017
- Lawyers of Executive Distinction – Taxation – Lawyers of Distinction, June 2017
- Very Inspirational People, *metroMAGAZINE*, Summer 2017
- 2017 Top Rated Lawyers, *National Law Journal*, March 2017
- 2017 Women Leaders in the Law, *Corporate Counsel Magazine*, March 2017
- Nebraska Cancer Coalition Partnership Award 2016
- Featured in Fortune Magazine “Women in Law,” September 15, 2015 *Fortune Magazine*
- James Keane Memorial Award March 2015 presented by American Bar Association Law Practice Division for innovation in technology in the practice of law
- Featured in: “You Know What They Say: If You Want Something Done, Ask a Busy Person,” Interview with Omaha Daily Record, September 5, 2014
- Best Dressed, Strictly Business Magazine, 2008