

Bernard E. Jones

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Personal

Age 48; married 25 years (Debby); 2 children (daughter Rachel, age 19; son Jordan, age 15)

Professional

- *Board Certified*, Estate Planning and Probate Law, Texas Board of Legal Specialization (since 1991)
- *Fellow*, American College of Trust and Estate Council (elected 1995)
- *Adjunct Professor of Law* (former), University of Houston Law Center, Houston, Texas, 1995- 2001 (course: Estate Planning)
- Designer, author and owner of the *FlexDraft*® estate planning document assembly system for Texas estate planning attorneys (www.FlexDraft.com)
- *Member*, Texas Bar Association (admitted 1983)
 - Texas Bar Section on Real Estate, Probate and Trust Law
 - *Council Member*, 1998 - 2002
 - Grantor Trust Committee, *Chair*, 1999 - 2002
 - Community Property Committee, *Chair*, 1999 - 2002
 - Subcommittee on Transmutation, *member*, 1995 - 99, and *principal author* of statute and constitutional amendment effectuating "conversions to community"
 - Subcommittee on Revocable Trusts; *member*, 1991 - 92, *Chair*, 1993 - 94
 - Probate Code Committee, *member*, 1995 - 96
 - Texas Bar Section on Taxation
 - *Chair*, Community Property and Family Tax Committee (1992 - 93)
- *Other Professional Memberships*: College of the State Bar of Texas; Houston Bar Association and Section on Probate, Trusts and Estates (*council member*, 1996 - 98); Houston Estate and Financial Forum; Disability and Elder Law Attorneys' Association, Houston, Texas; American Bar Association and Sections on: Taxation; and Real Property, Probate and Trust Law

Education

- *Undergraduate*: University of Texas, Austin, Texas, Bachelor of Arts, *with honors*, May 1980
- *Law School*: University of Texas, Austin, Texas, Juris Doctor, *with honors*, May 1983

Speeches, Publications, etc.

- "*KISS*," *Simplified Complex Drafting*, 16th Annual State Bar of Texas Advanced Drafting: Estate Planning and Probate Course, October 27-28, 2005 (Austin) (outline and speech)

- *Estate Planning with Life Insurance*, Midland Business & Estate Council Seminar, September 13, 2005 (Midland) (outline and speech)
- Frost National Bank Estate Planning Seminar, August 25, 2005 (all day joint presentation with Glenn Karisch), topics presented: *Anatomy of a Will; Essential Estate Planning; Estate Planning with Life Insurance; Revocable Trusts; Irreconcilable Differences in Estate Planning* (repeat of Corpus Christi presentation on May 23, 2005, below)
- *Anatomy of a Will*, University of Texas School of Law, Intermediate Estate Planning, Guardianship and Elder Law Conference, August 11-12, 2005 (Galveston) (speech and co-author of outline)
- *Basic Estate Planning*, Texas State Bar College "Summer School", July 21 - 23, 2005 (Galveston) (speech and outline)
- *Overview of Trust Administration Under The Texas Trust Code*, Texas School of Trust Banking, June 11-16, 1989, June 11-16, 1995, June 9-14, 1996, June 9-13, 1997, June 7-11, 1998, June 7 - 11, 1999, June 12-16, 2000, June 17-22, 2001, June 16-21, 2002, June 9-13, 2002, June 9-13, 2003, June 14-18, 2004, and June 27, 2005 (Dallas) (speech, outline by Steve Akers)
- 32nd Annual Corpus Christi Estate Planning Council Estate Planning Seminar, May 23, 2005 (all day joint presentation with Glenn Karisch), topics presented: *Anatomy of a Will; Essential Estate Planning; Estate Planning with Life Insurance; Revocable Trusts; Irreconcilable Differences in Estate Planning*
- *Estate Planning with Life Insurance*, San Antonio Estate Planner's Council, Docket Call in Probate Court, February 17 - 18, 2005 (San Antonio) (outline and speech)
- *Estate Planning with Life Insurance*, Dallas CPA Society, Financial Planning Association of DFW, et al, 2nd Annual Joint Estate Planning Seminar, December 1, 2004 (Dallas) (speech and outline)
- *Revocable Trusts*, Austin Bar Association Estate Planning Luncheon, November 19, 2004 (Austin) (speech and outline)
- *CPA Ethics in ElderCare*, Houston CPA Society's 1st Annual ElderCare Symposium panel, November 15, 2005 (Houston) (panel discussion with Carol Cantrell and Richard Forrest)
- *The Benefits and Pitfalls of Living Trusts From Creation to Maturity*, University of Texas School of Law, Intermediate Estate Planning, Guardianship and Elder Law Conference, August 12-13, 2004 (Galveston) (outline and speech)
- *Estate Planning with Life Insurance*, 28th Annual State Bar of Texas Advanced Estate Planning and Probate Course, June 9-10, 2004 (San Antonio) (outline and speech)
- *Basic Estate Planning for Small Estates*, Texas State Bar College "Spring Training", March 26-27, 2004 (Dallas) (outline and speech)
- *Are We Artificially Intelligent? Reflections and Ideas on the Drafting Process*, 14th Annual State Bar of Texas Advanced Drafting: Estate Planning and Probate Course, October 23-24, 2003 (joint presentation with Rhonda H. Brink, outline by Rhonda H. Brink)
- *Wills and Living Trusts*, University of Texas School of Law, Intermediate Estate Planning, Guardianship and Elder Law Conference, August 14-15, 2003 (Galveston) (outline titled "Revocable Trusts" and speech)

- *The Family Limited Partnership - Marital Property & Ethical Considerations*, University of Texas School of Law, Current Issues Affecting Partnerships, Limited Partnerships and Limited Liability Companies, July 8-9, 1999, July 18-19, 2002, and July 17-18, 2003 (outline and speech)
- *Planning with Life Insurance*, Houston Estate and Financial Forum, February 20, 2003 (outline and speech; moderator of panel discussion, panel members: Chuck Bracht and Terri Seigel)
- *Marital Agreements: Interesting Perspectives from Probate & Divorce Counsel*, Houston Bar Association 2003 Wills and Probate Institute, January 23, 2003 (joint presentation with Harry Tindall, outline by Prof. Tom Featherston)
- State Bar of Texas Fourth Annual Building Blocks of Wills, Estates and Probate Course, January 17, 2003: (i) *Estate Planning - Beyond the Basics* (moderator of panel discussion, panel members: Marjorie J. Stephens and Steven J. Tackett), and (ii) author of the following outlines presented in conjunction with panel discussion: *Revocable Trusts* (updated by Karen S. Gerstner) and *The Anatomy of a Will* (prepared jointly with Steve Akers, updated by R.J. Watts)
- *The Family Limited Partnership - Marital Property & Ethical Considerations*, Midland Business & Estate Council Seminar, January 14, 2003 (outline and speech)
- *The Electronic Office - Bigger, Better, Smarter, and More Efficient*, and *Tech Tutorial* (continuation of presentation), 13th Annual State Bar of Texas Advanced Drafting: Estate Planning and Probate Course, October 31-November 1, 2002 (moderator of panel discussion, panel members: Thomas Baird and Matthew Booth)
- *Community Property Planning: Selected Issues From the Perspective of Estate Planning and Divorce Attorneys*, Dallas Estate Planning Council, September 12, 2002 (joint presentation with Harry Tindall, outline by Prof. Tom Featherston)
- Houston Bar Association Family/Probate Bench Bar Conference, October 25-26, 2002: (i) *2003 Legislation - What is Coming Up on the Horizon* (outline and presentation), (ii) breakout session discussion leader (jointly with two others), and (iii) planning committee member
- *The Routine and the Unexpected*, Estate & Charitable Planning Institute, September 24, 2002 (local Houston moderator for national live satellite presentation by Roy Adams; Salvation Army and Wells Fargo sponsored event)
- *Will Review Checklist: A Practical Guide for CPAs*, Texas Society of CPAs 2002 Advanced Estate Planning Conference, August 22-23, 2002 (outline and speech)
- *Essential Estate Planning For (Potentially) Incapacitated Clients*, University of Texas School of Law, Intermediate Estate Planning, Guardianship and Elder Law Conference, August 15-16, 2002 (outline and speech)
- *Drafting Strategies for Advance Planning*; Advanced Estate Planning Strategies 2002; April 18-19, 2002 (panel discussion with Kate Hopkins, Stephanie Donaho, and Stanley M. Johanson)
- State Bar of Texas Third Annual Building Blocks of Wills, Estates and Probate Course, January 18, 2002: (i) *Drafting Issues in Estate Plan Documents* (moderator of panel discussion, panel members: Stephen R. Akers and Stephanie E. Donaho), and (ii) *Estate*

Planning in the Shadow of EGTRRA - A Work in Progress (outline presented in conjunction with panel discussion)

- *Estate Planning for the Moderate Estate*, Texas State Bar College "Summer School", July 26-28, 2001; (outline and speech)
- State Bar of Texas Wills, Estates and Probate: A Satellite Broadcast, January 19, 2001: (i) Planning Chair, (ii) Institute Director and (iii) moderator of all panel discussions
- *Tax Considerations in Retirement Planning*, Texas Society of CPAs, Houston Chapter, 2001 CPE Tax Expo, January 10-11, 2001 (speech, outline by Karen Gerstner)
- *Essential Estate Planning For (Potentially) Incapacitated Clients*, State Bar of Texas Elder Law Course and Guardianship Program, December 7-8, 2000 (Houston) and February 8-9 (Dallas) (outline and speech)
- *Transmutations*, Houston Bar Association Family/Probate Bench Bar Conference, October 27-28, 2000 (joint presentation with Stewart W. Gagnon)
- *Statutory Forms Update: An Overview of State Statutory Forms Revised by the '99 Texas Legislature (Including Other "Ancillary" Forms)*, 14th Annual South Texas College of Law Wills and Probate Institute, September 14-15, 2000; (outline and speech)
- 27th Annual Corpus Christi Estate Planning Council Estate Planning Seminar, May 19, 2000 (all day joint presentation with Prof. Tom Featherston), topics presented: *Tax Law Update; Family Limited Partnerships - Marital Property and Ethical Considerations; Estate Planning for Moderately Wealthy Clients; Planning for Retirement Benefits; and Income Taxation of Estates, Trusts and Their Beneficiaries*
- *Estate Planning for the "Moderately Wealthy" Client*, Texas Society of Certified Public Accountants, Houston Chapter, Small Practitioner Study Group Lecture Series, January 27, 2000 (speech, outline by Mickey Davis)
- *Statutory Forms Update: An Overview of State Statutory Forms Revised by the '99 Texas Legislature*, Disability and Elder Law Attorneys' Association (Houston, Texas), January 24, 2000 (outline and speech)
- Wills, Estates and Probate: A Satellite Broadcast, January 21, 2000: *Marital Property and Nonprobate Assets* (panel discussion moderator), and *Conversions to Community* (outline presented in conjunction with panel discussion)
- 10th Annual State Bar of Texas Advanced Drafting: Estate Planning and Probate Course, October 28-18, 1999: (i) Course Director; (ii) *Statutory Forms Update: An Overview of State Statutory Forms Revised by the '99 Texas Legislature* (outline and speech); and (iii) *Wrap-Up Session: A Summary and Additional Commentary* (joint presentation with Stephen Saunders)
- *The Family Limited Partnership - Marital Property & Ethical Considerations*, 23rd Annual State Bar of Texas Advanced Estate Planning and Probate Course, June 4-6, 1999 (outline and speech)
- *Irreconcilable Differences*, Houston Bar Association 1999 Wills and Probate Institute, February 5, 1999 (outline and speech)
- *Strategies for Developing a Successful Estate Planning Practice*, State Bar of Texas, December 4, 1998 (all day panel presentation with Stephen Saunders, Karen Gerstner & Steven Tackett)

- *The Family Limited Partnership - Marital Property & Ethical Considerations*, University of Texas School of Law Texas Marital Property Institute, October 22-23, 1998 (outline and speech)
- *Estate Planning Options and Techniques for Persons with Disabilities*, State Bar of Texas Planning Strategies for Persons with Disabilities, February 12-16, 1998 (outline and speech)
- *Ethics and Malpractice: Practical Considerations for Estate Planning and Probate Lawyers: a Case Study*, Houston Bar Association Wills and Probate Institute 1998, February 6, 1998 (panel discussion, joint presentation with Prof. Helen Jenkins and Robert S. MacIntyre)
- *Planning for Distributions from Qualified Plans and IRAs*, Texas Society of Certified Public Accountants, Houston Chapter, PFP Lecture Series, January 15, 1998 (outline and speech)
- *Generation-Skipping Transfer Tax: Trust Severances and Exemption Allocations*, 21st Annual State Bar of Texas Advanced Estate Planning and Probate Course, June 4-6, 1997 (speech, outline prepared jointly with Mickey Davis & Jerry Scroggins)
- University of Houston Business and Estate Planning Institute, April 24-25 & May 1-2, 1997, May 21-22 & May 28-29, 1998 (advisory committee member)
- *Revocable Trusts*, Texas Society of Certified Public Accountants, Houston Chapter, PFP Lecture Series, April 2, 1997 (outline and speech)
- *The Estate Planning Course*, Professional Education Systems, Inc., November 6-8, 1996 (joint presentation with John K. Round)
- *Anatomy of a Will: Avoiding Malpractice Traps*, State Bar of Texas Elder Law Institute 1996, October 4 & 18, 1996 (speech, outline prepared jointly with Steve Akers)
- *Pros and Cons of Living Trusts and Wills*, 10th Annual South Texas College of Law Wills and Probate Institute, September 26-27, 1996 (outline and speech)
- *Reality Check - Practical Estate Planning Applications*, Texas Society of Certified Public Accountants, 1996 Annual Advanced Estate Planning Conference, September 5-6, 1996 (outline and speech)
- *Anatomy of a Will*, 20th Annual State Bar of Texas Advanced Estate Planning and Probate Course, June 5-7, 1996 (speech, outline prepared jointly with Steve Akers)
- *Revocable Trusts Pros and Cons*, Houston Bar Association, Probate and Trusts Section, April 30, 1996 (outline and joint presentation with Leonard Weiner)
- *Estate Planning For Incapacitated Individuals*, Corpus Christi Business and Estate Planning Council, March 21, 1996, (outline and speech)
- *Anatomy of a Will*, South Texas College of Law Wills and Probate Institute, September 23-24, 1993, September 28-29, 1995, and September 18-19, 1997 (speech, outline prepared jointly with Steve Akers)
- *Practical Considerations In Will Drafting, Part I: Requisites, General Provisions, and Fiduciaries*, University of Houston Wills and Probate Institute, July 13-14, 1989, June 28-29, 1990, August 8-9 & 29-30, 1991, June 25-26, 1992, July 9-10, 1992, June 17-18 & July 1-2, 1993, and June 15-16 & 22-23, 1995; and University of Houston General Practice Institute, December 13-14, 1990, December 5-6, 1991, December 3-4, 1992, January 13-

- 14, 1994, June 20-21 & 27-28, 1996, and July 10-11 & 24-25, 1997 (speech, outline prepared jointly with Steve Akers)
- *Overview of Trust Administration Under The Texas Trust Code*, Texas School of Trust Banking, June 11-16, 1989, June 11-16, 1995, June 9-14, 1996, June 9-13, 1997, June 7-11, 1998, June 7 - 11, 1999, and June 12 - 16, 2000 (speech, outline by Steve Akers)
 - *Wills, General Provisions and Requisites*, 38th Annual County Judges and Commissioners' Continuing Education Conference & Educational Exposition, January 16-18, 1996 (speech, outline by Steve Akers)
 - *Estate Planning for Incapacitated Persons*, Texas Society of Certified Public Accountants, Houston Chapter, PFP Lecture Series, December 6 & 12, 1995 (outline and speech)
 - *Probate Update*, State Bar of Texas, Legislative Update Institute, September 8, 1995, (speech, outline by Al Golden)
 - *Estate Planning for Incapacitated Individuals*, 33 REAL ESTATE, PROBATE & TRUST LAW REPORTER 27, July, 1995 (State Bar of Texas) (article)
 - *Revocable Trusts*, Houston Bar Association, Probate and Trusts Section, November 29, 1994 (outline and speech)
 - *Estate Planning For Incapacitated Individuals; Section 867 Trusts*, 5th Annual State Bar of Texas Advanced Drafting: Estate Planning and Probate Course, November 3-4, 1994 (outline and speech)
 - *Document Assembly--An Attorney's View*, Law Technology '94, September 29--October 1, 1994 (outline and speech)
 - *The Art of Making Uncle Sam Your Assignee Instead of Your Senior Partner: The Use of Family Limited Partnerships in Estate Planning*, Texas Society of Certified Public Accountants, 29th Annual Advanced Estate Planning Conference, September 29-30, 1994 (joint presentation with S. Stacy Eastland, outline by S. Stacy Eastland)
 - *Funding and Administering Living Trusts*, 8th Annual South Texas College of Law Wills and Probate Institute, September 22-23, 1994 (outline and speech; planning committee member)
 - *Estate Planning For Incapacitated Individuals*, 18th Annual State Bar of Texas Advanced Estate Planning and Probate Course, June 1-3, 1994 (outline and speech; planning committee member)
 - First and Third Annual State Bar of Texas Advanced Estate Planning Strategies Workshop, April 21-22, 1994 and April 18-19, 1996 (planning committee member)
 - *Revocable Trusts*, Southern Nevada Estate Planning Council, September 13, 1993 (speech and outline)
 - *Revocable Trusts: Nuts and Bolts*, 17th Annual State Bar of Texas Advanced Estate Planning and Probate Course, June 2-4, 1993 (outline and speech)
 - *The Wills Course*, Professional Education Systems, Inc., May 20 & 21 1993 (joint presentation and outline preparation/revision with John K. Round and Robert M. Bandy)
 - *The Trust Course*, Professional Education Systems, Inc., June 10 & 11, 1993 (joint presentation and outline preparation/revision with John K. Round and Robert M. Bandy)

- *Revocable Trusts--Tax Issues, Perpetuities, When and How to Fund*, 3rd Annual State Bar of Texas Advanced Drafting: Estate Planning and Probate Course, November 12-13, 1992 (outline and speech)
- *Practical Considerations In Will Drafting (Parts I and II)*, University of Houston General Practice Institute, June 6-7, 1991, June 4-5, 1992, and June 23-24, 1994 (speech, outline by Steve Akers)
- *Estate Planning With Revocable Trusts*, El Paso Estate Planning Council, January 21, 1992 (outline and speech)
- *Estate Planning With Revocable Trusts*, 39th Annual Texas Tech Tax Institute, October 24, 1991 (outline and speech)
- *Creditors' Claims To Life Insurance And Annuities--A First Look At The New Law*, American Society of CLU & ChFC Advanced Underwriting Seminar (sponsored by Jenkins & Gilchrist, P.C., Dallas, Texas), October 23, 1991 (outline and speech)
- *Revocable Trusts*, Dallas Association of Legal Assistants, Probate Section, March 28, 1991 (outline and speech)
- *Probate In Texas*, Dallas Association Of Legal Assistants, January 10, 1991 (speech)
- *Putting Revocable Trusts In Their Place*, 129 TRUSTS & ESTATES 8 (September 1990, cover story) (article) *Creditors' Rights To Your Retirement Plan*, 17 THE TEXAS INDEPENDENT BANKER 22 (April 1990) (article)
- *Loving Trust Estate Plan Examined*, Jenkins & Gilchrist, P.C., Client Bulletin, Fall 1989, p. 4 (article)
- *Practical Considerations In Will Drafting (selected topics)*, Dallas Bar Association Friday Clinic, November 10, 1989 (speech, outline by Steve Akers)
- *Creditors Rights To Your Retirement Plan Benefits: A Tale Of Two Doctors*, Jenkins & Gilchrist, P.C., Client Bulletin, Summer 1989, p. 10 (article)
- *Split Dollar Revisited*, Jenkins & Gilchrist, P.C., Insurance Seminar, June 1989 (outline and speech)

Employment History

- *Solo practitioner, Houston, Texas*
January 2004 to the present, area of practice: estate planning and probate
- *Davis, Ridout, Jones, & Gerstner, L.L.P., Houston, Texas*¹
Partner, July 1996 to December 2003, area of practice: estate planning and probate
- *Cenatiempo & Gardner, Houston, Texas*
Associate, May 1992 to June 1996, area of practice: estate planning and probate
- *Jenkins & Gilchrist, P.C., Dallas, Texas*
Associate in Estate Planning, Probate and Trusts Section, Feb. 1989 to May 1992

¹formerly known as Davis, Ridout & Jones, L.L.P. The firm dissolved on 12/31/2003.

- *Brice & Mankoff, P.C., Dallas, Texas*
Associate in Estate Planning Section, spring 1987 to February 1989
- *Spradley, Rushing & Davis, Dallas, Texas*
Associate, summer 1984 to spring 1987, areas of practice included commercial real estate, estate planning and probate
- *McLeod, Alexander, Powell & Apfel, P.C., Galveston, Texas*
Associate, summer 1983 to summer 1984, areas of practice included federal income taxation, securities--private placements, appellate briefing, estate planning, real estate, and corporate
- *Center for Cybernetic Studies, University of Texas at Austin, Austin, Texas*
Computer programmer, fall 1980 to spring 1983 (during law school), designed and programmed user interface software, installed and maintained applications programs, wrote user reference manuals, and provided consultation services

Revised November, 2005

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