# Karen S. Gerstner

**Attorney at Law**

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## Professional

- *Board Certified*, Estate Planning and Probate Law, Texas Board of Legal Specialization

- *Fellow*, American College of Trust and Estate Counsel

- *Member*, Houston Bar Association
  - *Immediate Past Chair*, Probate, Trusts and Estates Section, 1999-2000
  - *Past Chairman*, Elder Law Committee, 1991-1992; Elder Law Seminar Chairman, 1992-1993
  - *Treasurer*, Law Practice Management Section, 1996-1997

- *Director*, Houston Estate and Financial Forum, 1995-2001

- *Past President*, Planned Giving Council of Houston, 1993-1994; 1992 Annual Conference Chairman

- *Member*, Supreme Court of Texas Admissions Committee, 1982-1997

- *Member*, State Bar of Texas
  - *Trust Law Editor*, Real Estate, Probate and Trust Law Section Quarterly Newsletter, 1988-1992
  - Chairman, Real Estate, Probate and Trust Law Section Committee on Revising the Texas Guardianship Statutes, 1990-1992

- *Fellow*, Houston Bar Foundation, Texas Bar Foundation

- *Other Professional Memberships:* American Bar Association and Section on Real Property, Probate and Trust Law; College of the State Bar of Texas; Women Attorneys in Tax and Probate (former officer); Disability and Elder Law Attorneys Association

- *Other Professional Matters:*
  - Frequent Radio Talk Show Guest (KPRC Money Matters with Steve Drake and Randy Price)
  - Former professor, estate planning and probate law, Southwestern Paralegal Institute, 1982-1983
  - Law Clerk, U.S. Magistrate for the Southern District of Texas, 1980-1981

## Education

- *Undergraduate:* B.A. with Honors, Miami University, Oxford, Ohio 1977 (Phi Beta Kappa)

- *Law School:* J.D., Case Western Reserve University School of Law, Cleveland, Ohio, 1980

**Speeches, Publications, etc.**

- *Naming a Trust as the Beneficiary of Qualified Plan Benefits and IRAs,* State Bar of Texas Advanced Estate Planning Strategies Course 2000, April 2000. (Author/Speaker)

- *Naming a Trust as the Beneficiary of Qualified Retirement Plans and IRAs: Can We Have Our Cake and Eat It Too?,* Houston Estate and Financial Forum, April 2000. (Author/Speaker)

- *Tax Considerations in Probate and Trust Litigation,* American Bar Association, Section of Real Property, Probate and Trust Law, 11th Annual Spring CLE Symposia, March 2000. (Author/Speaker)

- *Beneficiary Designations for Qualified Plans and IRAs,* Houston Bar Association Wills and Probate Institute, February 2000. (Author/Speaker)

- *Designating Trusts as Beneficiaries of Qualified Plans and IRAs,* State Bar of Texas 10th Annual Advanced Drafting: Estate Planning and Probate Course, November 1999. (Author/Speaker)

- *Designating Trusts as Beneficiaries of Qualified Plans and IRAs*, Dallas Bar Association - Probate, Trust and Estates Section, October 1999 (Author/Speaker)

- *Selected IRA and Retirement Plan Issues, such as Designating Beneficiaries, Understanding the Minimum Distribution Rules and Coordinating Payments,* South Texas College of Law, 13th Annual Wills & Probate Institute, September 1999. (Author/Speaker)

- *Naming a Trust as the Beneficiary of Retirement Plans: Can We Have Our Cake and Eat It, Too?,* The Southwestern Legal Foundation, 38th Annual Wills and Probate Institute, May 1999. (Author/Speaker)

- *Strategies for Developing a Successful Estate Planning Practice (all day panel of 4 attorneys)*, State Bar of Texas Professional Development Program, December 1998. (Author/Speaker)

- *Multiple Party Accounts: Multiple Risks for Estate Planning Attorneys and Their Clients*, Tarrant County Probate Bar Association, December 1998. (Author/Speaker)

- *Charitable Remainder Trusts*, Rice University Fund Raising 202: Introduction to Planned Giving (a serialized course), September-October 1998 (Co-Author/Speaker)

- *Multi-Party Accounts: Multiple Risks for Attorneys and their Clients,* South Texas College of Law, 12th Annual Wills and Probate Institute, September 1998. (Author/Speaker)

- *The Case is Settled -- Who Pays the Taxes? Tax Considerations in Probate and Trust Litigation*, The Southwestern Legal Foundation, 37th Annual Wills and Probate Institute, May 1998. (Author/Speaker)

- *Planning Strategies for Persons with Disabilities*, State Bar of Texas Professional Development Program, February 1998. (Speaker)

- *Multiple Party Accounts: Multiple Risks for Estate Planning Professionals and Their Clients*, State Bar of Texas, Legal Assistants Division, Advanced Estate Planning & Probate Seminar, 1997. (Author/Speaker)

- *Special Needs Trusts,* Disability and Elder Law Attorneys Association (DELAA), April 1996. (Author/Speaker)

- *Multiple Party Accounts: Multiple Risks for Estate Planning Professionals and Their* Clients, Houston Estate and Financial Forum, March 1996. (Author/Speaker)

- *Settlements and Trust Modifications: Tax Considerations,* Houston Bar Association, Wills and Probate Institute, February 1996. (Author/Speaker)

- *Multiple Party Accounts: Multiple Risks for Estate Planning Professionals and Their* Clients, Central Texas Estate Planning Council, January 1996. (Author/Speaker)

- *Multiple Party Accounts and Non-Testamentary Transfers,* South Texas College of Law, Wills and Probate Institute, September 1995. (Author/Speaker)

- *A Potpourri of Disclaimer Issues,* Women Attorneys in Tax and Probate, July 1995. (Author/Speaker)

- *Multiple Party Accounts: Multiple Risks for Estate Planning Attorneys and Their Clients,* State Bar of Texas 19th Annual Advanced Estate Planning and Probate Course, June 1995. (Author/Speaker)

- *Guide to Estate Administration: Checklist and Form Letters*, Houston Bar Association, Probate, Trusts and Estates Section, May 1995. (Author/Speaker)

- *Non-Probate Assets: The Missing Piece of the Estate Planning Puzzle,* Brazos Valley Estate and Financial Planning Council, February 1995. (Author/Speaker)

- *Drafting Trusts: Basic Considerations,* University of Houston General Practice Institute, December 1994. (Author/Speaker)

- *Litigation Perspective on Traditional Will Drafting,* State Bar of Texas 5th Annual Advanced Drafting: Estate Planning and Probate Course, November 1994. (Author/Speaker)

- *Estate Administration Checklist*, South Texas College of Law, 8th Annual Wills & Probate Institute, September 1994. (Author/Speaker)

- *Multiple-Party Accounts,* Houston Bar Association, Probate, Trusts and Estates Section, March 1994. (Author/Speaker)

- *How to Get Your Money Where You Want It To Go: Estate Planning and Probate Law*, Houston Bar Association Continuing Legal Education Seminar, December 1993 (Author/Speaker)

- *The ABC's Through XYZ's of GST's (Including the Proposed Regulations),* State Bar of Texas 17th Annual Advanced Estate Planning and Probate Course, June 1993. (Author/Speaker)

- *Non-Probate Assets: The Missing Piece of the Estate Planning Puzzle*, Houston Estate and Financial Forum, 1993. (Author/Speaker)

- *The Essentials of Representing Senior Citizens*, Houston Bar Association Elder Law Seminar, April 1993 (Author/Speaker)

- *The K.I.S.S.* Principle (*Keep it Short and Simple) -- The Very Basics of Planned Giving*, Planned Giving Council of Houston, 2nd Annual Planned Giving Conference, November 1992. (Author/Speaker)

- *Tax Considerations in Probate and Trust Litigation,* Houston Chapter of Texas Society of CPA's Litigation Services Committee, 1992. (Author/Speaker)

- *Non-Probate Assets: The Missing Piece of the Estate Planning Puzzle*, Houston Bar Association and Judicare Committee Elder Law Seminar, April 1992. (Author/Speaker)

- *Tax Considerations in Probate and Trust Litigation*, Houston Estate and Financial Forum, 1991. (Author/Speaker)

- *Fiduciary Liability Issues,* South Texas College of Law, 5th Annual Wills & Probate Institute, October 1991. (Author/Speaker)

- *Tax Considerations in Probate and Trust Litigation,* State Bar of Texas 15th Annual Advanced Estate Planning & Probate Course, June 1991. (Author/Speaker)

- *Tax Considerations in Probate and Trust Litigation,* Women Attorneys in Tax and Probate, 1991. (Author/Speaker)

- *Texas Federal Fiduciary Income Tax (written materials modified),* Professional Education Systems, Inc., November 1990. (Author/Speaker)

- *The Proposed Texas Guardianship Code*, Travis County Bar Association, Fifth Annual Probate and Estate Planning Seminar, November 1990. (Author/Speaker)

- *Staying Out of Trouble with the Generation-Skipping Transfer Tax*, South Texas College of Law, 4th Annual Wills and Probate Institute, September 1990. (Author/Speaker)

- *Tax Considerations in Probate and Trust Litigation*, Houston Bar Association, Wills & Probate Institute, January 1990. (Author/Speaker)

- *Essential But Neglected Estate Planning Documents and Forms: Power of Attorney, Directive to Physicians, Designation of Guardian, Anatomical Gifts (speaker only)*, State Bar of Texas, Professional Development Program: Will Drafting (an Institute Series), March 1989. (Speaker)

- *Wills and Estate Planning,* American Bar Association's Law Student Division (University of Houston), 1989. (Author/Speaker)

- *Report Concerning Activities of the Texas Guardianship Code Committee,* Houston Bar Association, Probate, Trusts & Estate Section, 1989. (Author/Speaker)

- *Testamentary Charitable Giving*, Planned Giving Council of Houston, January 1989. (Author/Speaker)

- *Fiduciary Liability in Probate Administration and Trusts, Recent Cases and Trends,* Houston Bar Association, Continuing Legal Education Committee, January 1988. (Author/Speaker)

- *Basic Will Drafting*, Professional Education Systems, Inc. Texas Basic Will and Trust Drafting Seminar, 1988. (Author/Speaker)

- *Marital Property -- Rights of Surviving Spouse,* State Bar of Texas, Professional Development Program: Administering the Estate: A Practical Guide to Probate Institute, 1988. (Speaker)

- *The Fundamentals of Estate Tax Planning; Unified Credit/Exemption; Marital, Charitable and other deductions,* American Bar Association, Young Lawyers Division, Estate Planning for the General Practitioner, March 1988. (Speaker)

- *Tax Considerations,* Professional Education Systems, Inc., Texas Practical Probate Seminar, January 1988. (Author/Speaker)

- *Fiduciary Liability Issues,* Texas College of Probate Judges, May 1987. (Author/Speaker)