MICKEY R. DAVIS
PARTNER
DAVIS & WILLMS, PLLC
355 TIMMONS LANE, SUITE 1250
HOUSTON, TEXAS 77027
(281) 786-4500
MICKEY@DAVISWILLMS.COM

EDUCATION:

· University of Texas School of Law, J.D. with High Honors, 1982. Chancellors; Order of the Coif; Associate Editor, *Texas Law Review*; Member, Board of Advocates.
· University of Arizona, B.B.A. with High Distinction, 1979. Beta Alpha Psi; Beta Gamma Sigma.

OTHER QUALIFICATIONS:

· Board Certified, Estate Planning and Probate Law, Texas Board of Legal Specialization.
· Admitted to Practice: State Bar of Texas; Federal District Court for the Southern District of Texas; United States Tax Court.
· Certified Public Accountant, Texas, Certified 1983.
· Adjunct Professor, University of Houston School of Law, 1988– , teaching Income Taxation of Trusts and Estates and Postmortem Estate Planning.

PROFESSIONAL ACTIVITIES:

· Fellow, The American College of Trust and Estate Counsel (Estate Planning, Business Planning and Fiduciary Income Tax Committees).
· Associate Editor, ACTEC LAW JOURNAL.
· Member, State Bar of Texas (Sections of Real Property, Probate and Trust Law; Taxation); Houston Bar Association (Sections of Probate, Trust and Estate; Taxation); College of State Bar of Texas; Texas Academy of Probate and Trust Lawyers; Houston Estate and Financial Forum; Houston Business and Estate Planning Council
· Member, Texas Society of Certified Public Accountants, Houston Chapter; American Institute of Certified Public Accountants.

RECENT SPEECHES AND PUBLICATIONS:

· Co-Author: Streng & Davis, RETIREMENT PLANNING–TAX AND FINANCIAL STRATEGIES (2nd ed., Warren, Gorham & Lamont (2001 updated annually).
· Panelist: *Keeping Your Plan From Getting Waylaid in Administration*, State Bar of Texas 17th Annual Advanced Estate Planning Strategies Course, 2011.
· Author/Speaker: *2010 and Beyond: Estate Planning and Administration Issues*, State Bar of Texas 21st Annual Estate Planning and Probate Drafting Course, 2010.
· Author/Speaker: *2010 Estate Tax Rules*, San Antonio Estate Planning Council, 2010.
· Author/Speaker: *Practical Issues and Esoterica of Form 1041 Preparation and Presentation*, 45th Annual Southern Federal Tax Institute, 2010.
· Panelist: *2010 and Beyond*, 25th Annual South Texas College of Law Wills and Probate Institute.
· Author/Speaker: *Estate Planning in Changing and Challenging Times*, Texas Society of CPAs Advanced Estate Planning Conference, 2010.
· Panelist/Author: *Practicing in Interesting Times—Administering Estates in 2010: Pre-Mortem and Post-Mortem Income Tax Issues*, The American College of Trust and Estate Counsel Summer Meeting, 2010.
· Author/Speaker: *Basic and Advanced Estate Planning*, Texas Society of CPAs CPE by the Sea Conference, 2010.
· Course Director: State Bar of Texas 16th Annual Advanced Estate Planning Strategies Course, 2010
· Author/Speaker: *Trust and Estate Accounting Issues*, Corpus Christi Estate Planning Council, 2010.
· Author/Speaker: *Unfunded Testamentary Trusts, and Other Thorny Issue*, Dallas Bar Association Probate Section, 2010.
· Author/Speaker: *Estate Planning in a New Financial Environment*, Texas Society of CPAs Advanced Estate Planning Conference, 2009
· Author/Speaker: *Income Taxation of Trusts and Estates*, State Bar of Texas 33rd Annual Advanced Estate Planning & Probate Course, 2009

- Panelist: *Hard Times And Changing Landscapes: Reassessing Estate Plans While The Financial World Is Falling Apart*, State Bar of Texas 15th Annual Advanced Estate Planning Strategies Course, 2009
- Author/Speaker: *Section 6694 And Circular 230 Present Your New Estate Planning Client: The IRS*, 43rd Annual Southern Federal Tax Institute, 2008; Texas Society of CPAs Advanced Estate Planning Conference, 2008
- Author/Speaker: *Irrevocable Life Insurance Trusts and Bypass Trusts: Drafting and Funding*, 10th Annual University of Texas Estate Planning, Guardianship and Elder Law Conference 2009
- Panelist: *Income Tax Nuggets -- Pre and Post Death*, State Bar of Texas 14th Annual Advanced Estate Planning Strategies Course, 2008
- Author/Speaker: *Post-Mortem Estate Planning*, Houston TSCPA Foundation, 2007
- Author/Speaker: *Pre-Mortem and Post-Mortem Income Tax Issues*, University of Texas 55th Annual Taxation Conference, 2007
- Author/Panelist: *The Morning After: Avoiding Tax Surprises in Trust and Estate Litigation*, Houston Bar Association Probate Section, 2008; ABA - eCLE, 2008, ABA Joint Meeting of the Tax Section and the Real Property Trust and Estate Law Section, 2007
- Author/Speaker: *Funding Unfunded Bypass Trusts*, Dallas Estate Planning Council, 2008; Texas Society of CPAs Advanced Estate Planning Conference, 2007; Midland Memorial Foundation and Midland College Tenth Annual Estate Planning Seminar, 2007; Houston Business & Estate Planning Council, 2007; State Bar of Texas 30th Annual Advanced Estate Planning and Probate Course, 2006
- Panelist: *The Plan: How We Analyze Information About Assets and the People Who Own Them*, State Bar of Texas Advanced Estate Planning Strategies Course, 2007
- Author/Speaker: *Basic Estate Planning*, State Bar of Texas Annual Building Blocks of Wills, Trusts and Estate Planning/Live Satellite Broadcast, 2001-2011
- Author/Speaker: *A New Look at Funding Marital Deduction and Bypass Trusts*, 9th Annual University of Texas Estate Planning, Guardianship and Elder Law Conference 2007; Texas Society of CPAs Advanced Estate Planning Conference, 2005
- Author/Speaker: *Top Ten Issues in Estate and Gift Tax Law*, South Texas College of Law 2006 Wills & Probate Institute, 2006
- Author/Speaker: *Asset Preservation in Light of Bankruptcy Reform*, Houston Association of Insurance and Financial Advisors, 2006
- Author/Speaker: *Funding Clauses*, Houston Bar Association 2006 Wills & Probate Institute, 2006
- Author/Speaker: *Post-Mortem Estate Planning*, 40th Annual Southern Federal Tax Institute, 2005
- Author/Speaker: *Revocable Trust: Annotated*. State Bar of Texas, 16th Annual Advanced Drafting: Estate Planning and Probate Course, 2005
- Author/Speaker: *Ten Things Estate Planners Need to Know About Income Taxation of Trusts and Estates*, San Antonio Estate Planning Council's Docket Call in Probate Court, 2007; Travis County Bar Association; Estate Planning & Probate Section, 2005; Austin Estate Planning Council, 2002
- Author/Speaker: *Allocating the GST Tax Exemption: All You Need to Know to Fill out the Form*, San Antonio Estate Planning Council's Docket Call in Probate Court, 2005; San Antonio Young Lawyer's Association, 2002; Houston Chapter Texas Society of CPAs 2001 Tax Expo, 2001; Texas Society of CPAs Advanced Estate Planning Conference, 2001; 35th Annual Southern Federal Tax Institute, 2000
- Author/Speaker: *What is Trust Income? A Look at the New Texas and IRS Rules* Houston Estate & Financial Forum, 2005
- Author/Speaker: *Estate Planning for the Moderately Wealthy Client*, Houston Bar Association Wills and Probate Institute, 2005
- Co-Author/Speaker: *Tax Considerations In Settlements & Judgments*, State Bar of Texas 29th Annual Advanced Estate Planning and Probate Course, 2005
- Co-Author/Speaker: *Current Developments in Income Taxation of Trusts and Estates*, Houston Bar Association Section of Taxation, 2005
- Author/Speaker: *Estate Planning in the Shadow of Estate Tax Repeal--Planning in Anticipation of Legislative Change*, Texas Society of CPA's 2004 Advanced Estate Planning Conference, 2004
- Speaker: *Fiduciary Income Tax*, Texas Bankers Association - 26th Annual Texas Trust School, 2004
- Program Director: State Bar of Texas 27th Annual Advanced Estate Planning and Probate Course 2003
- Author/Speaker: *Estate Planning Under the Economic Growth and Tax Relief Reconciliation Act of 2001–Drafting in Anticipation of Legislative Change*, State Bar of Texas Advanced Estate Planning Strategies Course, 2003
- Author/Speaker: *Income Tax Planning for Irrevocable Trusts and Estates*, 38th Annual Southern Federal Tax Institute, 2003
- Author/Speaker: *Estate Planning Under the Economic Growth and Tax Relief Reconciliation Act of 2001*, Houston Bar Association Tax Section, 2002