TERRI LYNN HELGE

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ACADEMIC APPOINTMENTS

TEXAS A&M UNIVERSITY SCHOOL OF LAW, Fort Worth, TX August 2013-Present
Associate Dean for Academic Affairs (effective Aug. 2018); Professor of Law. Teach Nonprofit Organizations, Wills and Estates, Estate and Gift Tax, Trusts and Fiduciary Responsibilities, Estate Planning and Drafting, Legislation and Regulation, and Marital Property.

TEXAS WESLEYAN UNIVERSITY SCHOOL OF LAW, Fort Worth, TX July 2006-August 2013
Professor of Law (August 2011-August 2013); *Associate Professor of Law* (July 2006-July 2011). Teach Nonprofit Organizations, Wills and Estates, Estate and Gift Tax, Trusts and Fiduciary Responsibilities, Estate Planning and Drafting, Legislation and Regulation, Charitable Organizations Seminar, and Marital Property.

- 2011 Recipient, Frederic White Faculty Scholarship Award (awarded to a faculty member who exhibits "steadfast commitment and contribution to legal scholarship" and who has made "a significant contribution to legal scholarship in published work, or works, during the previous calendar year")

BAYLOR UNIVERSITY SCHOOL OF LAW, Waco, TX May 2010-July 2010
Visitor. Taught Administration of Estates.

BOOKS AND LAW JOURNAL ARTICLES

TEXAS PROBATE, ESTATE AND TRUST ADMINISTRATION (25th ed.) (Matthew Bender forthcoming 2018)

WILLS, TRUSTS & FUTURE INTERESTS (5th ed.) (West Academic Publishing) (forthcoming 2018)

TEXAS PROBATE, ESTATE AND TRUST ADMINISTRATION (24th ed.) (Matthew Bender 2017)

Complex UBIT Issues and Strategies for Coping, JOURNAL OF EXEMPTS (Sept./Oct. 2017) (lead article)

Rejecting Charity: Why the IRS Denies Tax Exemption to 501(c)(3) Applicants, 14 PITT. TAX REV. 1 (2016) (lead article)

WILLS, TRUSTS & FUTURE INTERESTS (4th ed.) (Thompson West) (2012) (with Lawrence H. Averill)

The Taxation of Cause-Related Marketing, 85 CHICAGO-KENT LAW REVIEW 883 (2010)

Policing the Good Guys: Regulation of the Charitable Sector Through a Federal Charity Oversight Board, 19 CORNELL JOURNAL OF LAW & PUBLIC POLICY 1 (2009) (lead article)

- Reprinted in 8 INTERNATIONAL JOURNAL OF CIVIL SOCIETY LAW 2 at http://www.iccsl.org/pubs/10_04_IJCSL.pdf. (republishing selected nonprofit law review articles of interest to an international readership concerning developments in law affecting civil society)

OTHER PUBLICATIONS

Contributing Editor, Nonprofit Law Prof Blog, http://lawprofessors.typepad.com/nonprofit/ (2015-present)

Donor beware: Attaching strings to charitable gifts takes careful planning, THE CONVERSATION (forthcoming May 2018)

Commercializing and Protecting Intellectual Property in an Increasingly Open and Fluid World, TEXAS TAX LAWYER, Spring 2015

Nuts and Bolts of Unrelated Business Income Tax, TEXAS TAX LAWYER, Spring 2015

Joint Ventures of Nonprofits and For-Profits, TEXAS TAX LAWYER, Spring 2014

Tax Exemptions for Charitable Single-Member Limited Liability Companies, TEXAS TAX LAWYER, Fall 2012, at 67

Choice of Entity Considerations for Charitable Organizations, TEXAS TAX LAWYER, Spring 2012, at 8

Nonprofit Executive Compensation, TEXAS TAX LAWYER, Spring 2011, at 36

Teaching Specialized Legal Research: Business Entities, 29 LEGAL REFERENCE SERVICES QUARTERLY 51 (2010) (with Kristyn S. Helge)

Other People's Money: Implications of the Bernard Madoff Scandal on a Charitable Director's Fiduciary Duties Regarding Investments, TEXAS WESLEYAN LAWYER, Spring/Summer 2009, at 26

EDUCATION

SOUTH TEXAS COLLEGE OF LAW, Juris Doctor, *Summa Cum Laude* May 2001

Honors: Valedictorian (ranked first in graduating class)
Order of the Lytae (honorary fraternity recognizing outstanding academic achievement)
Professor Teresa S. Collett Writing Award
Lizabeth Parham Matthews Scholarship (awarded for excellence in academics, leadership and service)

Activities: South Texas Law Review, *Note & Comment Editor* (Fall 2000-Spring 2001), *Assistant Managing Editor* (Spring 2000)

UNIVERSITY OF ILLINOIS, Bachelor of Science in Accountancy, *Highest Honors* May 1994

PRESENTATIONS AND INTERVIEWS

Presenter (invited), *Federal Tax Update - Impact of Tax Cuts and the Jobs Act* – Governance of Nonprofits Organizations Course 2018, Austin, Texas (August 23, 2018)

Presenter, *Rebuking Charity: An Empirical Analysis of Why the IRS Revokes Tax Exemption of 501(c)(3) Organizations* – Southeastern Association of Law Schools Annual Meeting, Fort Lauderdale, Florida (August 10, 2018)

Discussant, *Tax Policy Discussion Group* – Southeastern Association of Law Schools Annual Meeting, Fort Lauderdale, Florida (August 10, 2018)

Discussant, *More than "Stiffs and Gifts": Topic Coverage of a Modern Trusts & Estates Course* – Southeastern Association of Law Schools Annual Meeting, Fort Lauderdale, Florida (August 10, 2018)

Presenter, *Rebuking Charity: An Empirical Analysis of Why the IRS Revokes Tax Exemption of 501(c)(3) Organizations* – Texas Tax Faculty Workshop, Texas Tech University School of Law, Lubbock, Texas (June 1, 2018)

Presenter, *Rebuking Charity: An Empirical Analysis of Why the IRS Revokes Tax Exemption of 501(c)(3) Organizations* – The Association for Mid-Career Tax Law Professors ("AMT") 2018 Conference, Georgetown Law Center, Washington, D.C. (May 21, 2018)

Presenter (invited), *Tax Cuts and Jobs Act of 2017 and its Impact on Nonprofits* – Dallas Bar Association Nonprofit Law Study Group, Dallas, Texas (March 21, 2018)

Presenter (invited), *Exempt Organizations Roundtable and Hot Topics Discussion* – 2018 Joint TE/GE Council Meeting, Baltimore, Maryland (February 22, 2018)

Moderator (invited), *Best Practices in Drafting and Interpreting IRS Guidance* – 2017 ABA Joint Fall Tax Section Meeting, Austin, Texas (Sept. 15, 2017)

Presenter (invited), *Best Practices in Fundraising* – Governance of Nonprofits Organizations Course 2017, Austin, Texas (August 24, 2017)

Discussant, *Tax Policy Discussion Group* – Southeastern Association of Law Schools Annual Meeting, Amelia Island, Florida (August 6, 2017)

Presenter (invited), *Fiduciary Duties of Charitable Managers* – Discover Wealth Management and Risk Management Programs, Texas A&M School of Law, Fort Worth, Texas (March 29, 2017)

Presenter (invited), *'Til Death Do Us . . . Partition?* – Obergefell: The Gray Area, Texas A&M School of Law, Fort Worth, Texas (March 8, 2017)

Discussant (invited), *Exempt Organizations Roundtable and Hot Topics Discussion* – 2017 Joint TE/GE Council Meeting, Baltimore, Maryland (February 23, 2017)

Presenter (invited), *Charitable Organization Update* – State Bar of Texas Tax Section Tax Law Survey in a Day, Dallas, Texas (February 3, 2017)

Presenter (invited), *It's Easy to (1023) EZ, but Should You?* – Governance of Nonprofits Organizations Course 2016, Austin, Texas (August 25, 2016)

Discussant, *Tax Policy Discussion Group* – Southeastern Association of Law Schools Annual Meeting, Amelia Island, Florida (August 9, 2016)

Presenter (invited), *Risk of Online Giving and Fundraising* – Nonprofit Management Center Lunch and Learn Seminar, Midland, Texas (July 11, 2016)

Presenter (invited), *Legal Update: Recent Exempt Organization Developments* – Texas Presbyterian Foundation CFO Financial Workshop, Dallas, Texas (June 15, 2016)

Presenter (invited), *Quarterly Update from the IRS TE/GE Division* – Gulf Coast Area TE/GE Council Meeting, Dallas, Texas (June 10, 2016)

Presenter, *Rejecting Charity: Why the IRS Denies Exemption to 501(c)(3) Applicants* – Texas Tax Faculty Workshop, Southern Methodist University Dedman School of Law, Dallas, Texas (May 20, 2016)

Presenter (invited), *Legal Aspects of Special Events* – LGT Not-For-Profit Half-Day Seminar, Dallas, Texas (March 3, 2016)

Presenter (invited), *Then You Need to Keep It: Complex UBIT Issues and Strategies for Coping* – 33rd Annual Nonprofit Organizations Institute, Austin, Texas (January 15, 2016)

Presenter (invited), *Emerging Issues in Fundraising* – Governance of Nonprofits Organizations Course 2015, Austin, Texas (August 13, 2015)

Presenter (invited), *You've Got a Great Reputation: Let's Keep it That Way* – Texas Presbyterian Foundation CFO Financial Workshop, Dallas, Texas (July 15, 2015)

Presenter (invited), *EO/TEGE Updates from Tammy Ripperda* – Gulf Coast Area TE/GE Council Meeting, Dallas, Texas (June 19, 2015)

Presenter (invited), *Nuts and Bolts of Unrelated Business Income Tax* – State Bar of Texas Tax Section Tax Law Survey in a Day, Dallas, Texas (February 6, 2015)

Presenter, *Rejecting Charity: Why the IRS Denies Exemption to 501(c)(3) Applicants* – Texas A&M University School of Law Faculty Colloquium, Fort Worth, Texas (February 4, 2015)

Presenter (invited), *Commercializing and Protecting Intellectual Property in an Increasingly Open and Fluid World* – 32nd Annual Nonprofit Organizations Institute, Austin, Texas (January 16, 2015)

Presenter (invited), *Rejecting Charity: Why the IRS Denies Exemption to 501(c)(3) Applicants* – American Association of Law Schools Annual Meeting, Washington, D.C. (January 3, 2015)

Presenter (invited), *Social Media Pitfalls for Nonprofits* – LGT Not-For-Profit Half-Day Seminar, Dallas, Texas (October 29, 2014)

Presenter (invited), *Nuts and Bolts of Unrelated Business Income Tax* –Houston TSCPA Foundation and United Way of Greater Houston Nonprofit Organization CPE, Houston, Texas (October 8, 2014)

Presenter (invited), *Staying Within the Lines: Recent Federal Tax and State Developments* – Texas Presbyterian Foundation CFO Financial Workshop, Dallas, Texas (June 18, 2014)

Presenter (invited), *Noncash Gifts Policies and Procedures* – 2014 Texas Society of Certified Public Accountants Nonprofit Organizations Conference, Dallas, Texas (May 19, 2014)

Presenter (invited), *411 on Fundraising for Charitable Organizations* – State Bar of Texas Tax Section Tax Law Survey in a Day, Dallas, Texas (February 28, 2014)

Presenter (invited), *Joint Ventures of Nonprofits and For-Profits* – Governance of Nonprofits Organizations Course 2013, Austin, Texas (August 22, 2013)

Presenter (invited), *The 411 on Representing Charitable Organizations* – Texas Wesleyan Law School Third Annual All Star Alumni CLE, Fort Worth, Texas (February 22, 2013)

Presenter (invited), *Cause-Related Marketing* – 30th Annual Nonprofit Organizations Institute, Austin, Texas (January 17, 2013)

Presenter (invited), *Finding the Treasure Box: Responsible Fundraising* – Mission Possible! 2012 Non-Profit Pro Bono Summit, Fort Worth, Texas (October 22, 2012)

Presenter (invited), *Nuts and Bolts of Unrelated Business Income Tax* – Governance of Nonprofits Organizations Course 2012, Austin, Texas (August 23, 2012)

Moderator, *The Conflict Between Protection of Free Expression and Protection of Human Dignity* – Southeastern Association of Law Schools Annual Meeting, Amelia Island, Florida (July 29, 2012)

Presenter (invited), *Legal Update: Corporate Governance, Fiduciary Investment Duties and Internal Fraud* – LGT & BBVA Compass Nonprofit Organization CPE, Dallas, Texas (June 27, 2012)

Presenter (invited), *Tax & Legislative Update: Selected Recent Developments Affecting Charities and Charitable Giving* – Texas Presbyterian Foundation CFO Financial Workshop, Dallas, Texas (June 20, 2012)

Moderator, *Democracy, Taxes, and Public Policy* – 2012 International Conference on Law & Society, Honolulu, Hawaii (June 7, 2012)

Presenter, *Reforming the Private Benefit Doctrine* – 2012 International Conference on Law & Society, Honolulu, Hawaii (June 6, 2012)

Presenter (invited), *Recognizing and Avoiding Self-Dealing: Both Direct and Indirect* – Dallas Society of Certified Public Accountants Convergence 2012 Conference, Dallas, Texas (May 4, 2012)

Interviewed, *Cause & Effect*, PERSPECTIVES (University of Illinois College of Business) (Spring 2012) (quoted on the impact of cause-related marketing activities on charitable organizations' federal tax-exempt status)

Presenter, *Legal Issues in Conducting Charitable Auctions, Raffles and Poker Tournaments* – Texas Wesleyan Law School Second Annual All Star Alumni CLE, Fort Worth, Texas (March 9, 2012)

Keynote Speaker, *Giving Strategies in the New Tax Climate* – Partnership for Philanthropic Planning (Lone Star Council), Fort Worth, Texas (February 21, 2012)

Keynote Speaker, *Tax & Legislative Update: Recent Developments in Charitable Giving* – Partnership for Philanthropic Planning (Lone Star Council), Fort Worth, Texas (February 21, 2012)

Presenter (invited), *Overview of Nonprofit Organizations: The Basic Framework* – 29th Annual Nonprofit Organizations Institute, Austin, Texas (January 18, 2012)

Presenter (invited), *Public Charities: A Practical Guide to Key Issues, Choices and Risks* – 29th Annual Nonprofit Organizations Institute, Austin, Texas (January 18, 2012)

Presenter (invited), *The 411 on Representing Nonprofit Corporations* – Dallas Bar Association Volunteer Attorney Program, Dallas, Texas (October 25, 2011)

Presenter, *Of Slayers, Sex Offenders, and Swindlers: Conduct-Based Disinheritance Statutes and a Paradigm for New Legislation* – Southeastern Association of Law Schools Annual Meeting, Hilton Head, North Carolina (July 29, 2011)

Presenter (invited), *Legal & Regulatory Update: Form 990, Corporate Governance, Fiduciary Investment Duties, and Internal Fraud* – Texas Presbyterian Foundation CFO Financial Workshop, Dallas, Texas (June 21, 2011)

Presenter (invited), *Executive Compensation* – Dallas Bar Association Nonprofit Study Group, Dallas, Texas (May 18, 2011)

Presenter (invited), *Executive Compensation* – Dallas Chapter of the Texas Society of Certified Public Accountants Not-For-Profit Study Group, Dallas, Texas (April 21, 2011)

Presenter, *Conduct Based Disinheritance Statutes: Lessons Learned From the Past and a Paradigm for Future Legislation* – Southwest Junior Scholars Conference (Arizona State University), Tempe, Arizona (March 14, 2011)

Interviewed, *Tips to make the taxing season less so*, FORT WORTH STAR-TELEGRAM (February 18, 2011) (quoted on the complexities of completing one's own tax return for an article describing tax tips for the average taxpayer)

Presenter, *Charitable Donations: Giving to Museums and Nonprofits* – Texas Wesleyan Law School Center for Law and Intellectual Property (CLIP) Art Law Workshop, Fort Worth, Texas (February 20, 2011)

Presenter (invited), T*ransactions Between Nonprofit and For-Profit Organizations* – Fort Worth Chapter of the Texas Society of Certified Public Accountants Nonprofit Organizations Conference, Fort Worth, Texas (January 25, 2011)

Presenter (invited), *Charitable Trusts vs. Nonprofit Corporations* – 28th Annual Nonprofit Organizations Institute, Austin, Texas (January 13, 2011)

Presenter (invited), *Understand how the Obama Tax Reforms will Impact Your Organization* – The 2010 Nonprofit Performance Summit, Arlington, Virginia (September 21, 2010)

Presenter (invited), *Impact of Estate Tax Repeal on Probate* – Tarrant County Probate Bar Association Seventh Probate Litigation Seminar, Fort Worth, Texas (September 17, 2010)

Presenter (invited), *Transactions Between Nonprofit and For-Profit Organizations* – Governance of Nonprofits Organizations Course 2010, Austin, Texas (August 19, 2010)

Presenter, *The Limitless Private Benefit Doctrine* – The Law and Society Association 2010 Annual Meeting, Chicago, Illinois (May 28, 2010)

Presenter (invited), *Cause Related Marketing: Legal Issues and Business Challenges* – 2010 Texas Society of Certified Public Accountants Nonprofit Organizations Conference, Dallas, Texas (May 24, 2010)

Presenter (invited), led discussion on federal regulation of the nonprofit sector at the *Emerging Issues in Philanthropy Seminar: A Federal Office on the Nonprofit Sector: What Do We Have? What Do We Need?*, hosted by the Urban Institute's Center on Nonprofits and Philanthropy and Harvard University's Hauser Center, Washington, D.C. (April 23, 2010)

Presenter, *The Limitless Private Benefit Doctrine* – Southwest Junior Scholars Conference (Arizona State University), Tempe, Arizona (March 15, 2010)

Presenter (invited), *Cause-Related Marketing: Legal Issues and Business Challenges* – 27th Annual Nonprofit Organizations Institute, Austin, Texas (January 14, 2010)

Interviewed on The Paul Edwards Program, a radio talk program airing on WLQV Salem, Detroit (December 14, 2009) (discussed the proposal for the creation of a federal charity oversight board described in *Policing the Good Guys: Regulation of the Charitable Sector Through a Federal Charity Oversight Board*, 19 CORNELL JOURNAL OF LAW & PUBLIC POLICY 1 (2009))

Presenter (invited), *Probate Basics* – Dallas Association of Young Lawyers, Dallas, Texas (November 5, 2009)

Presenter (invited), *The Taxation of Cause-Related Marketing* – American College of Trust and Estate Counsel (ACTEC) Symposium on Philanthropy in the 21st Century, Chicago-Kent College of Law, Chicago, Illinois (October 23, 2009)

Presenter, *The Taxation of Cause-Related Marketing* – Texas Wesleyan University School of Law Faculty Colloquium, Fort Worth, Texas (October 2009)

Presenter, *Policing the Good Guys: Regulation of the Charitable Sector Through a Federal Charity Oversight Board* – The Law and Society Association 2009 Annual Meeting, Denver, Colorado (May 2009)

Interviewed, *With the Economy Down*, Bartering Explodes, FORT WORTH STAR-TELEGRAM (March 14, 2009), reprinted in ATLANTA JOURNAL-CONSTITUTION (March 23, 2009)(quoted on the tax implications of bartering transactions for an article describing the substantial increase in bartering transactions in light of the economic crisis)

Presenter (invited), *Tax Aspects of Transactions with Charitable Organizations* – Tarrant County Probate Bar Association, Fort Worth, Texas (March 2009)

Presenter, *Conduct Based Disinheritance Statutes: Lessons Learned From the Past and a Paradigm for Future Legislation* – Texas Wesleyan University School of Law Faculty Colloquium, Fort Worth, Texas (March 2009)

Interviewed, *Mission in Peril*, HOOD COUNTY NEWS (February 7, 2009) (quoted on the fiduciary duties of charity managers for an article exposing alleged misuse of charitable assets at a local charity)

Presenter (invited), *When Two Worlds Collide: Issues to Consider when Taxable Parties Enter into Transactions with Charitable Organizations* – State Bar of Texas Tax Section, Webcast (February 2008)

Presenter (invited), *Incorporating Asset Protection into Your Estate Plan* – Tarrant County Bar Association Tax and Estate Planning Section, Fort Worth, Texas (February 2008)

Presenter, *Policing the Good Guys: An Alternative to the Regulation of Charitable Organizations* – Texas Wesleyan University School of Law Faculty Colloquium, Fort Worth, Texas (January 2008)

Presenter (invited), *Tax Aspects of Transactions with Charitable Organizations* – Dallas Bar Association Tax Section, Dallas, Texas (October 2007)

Presenter (invited), *Legislative Update from Washington on Charitable Reforms: The Pension Protection Act of 2006* – 2007 Texas Society of Certified Public Accountants Nonprofit Organizations Conference, Dallas, Texas (May 21, 2007)

OTHER PROFESSIONAL EXPERIENCE

THOMPSON & KNIGHT, LLP, Dallas, TX September 2001-June 2006
Associate.

- Plan and implement wealth transfers to family and charitable organizations using testamentary and lifetime vehicles, including wills, trusts, outright gifts, split-interest gifts, family-owned entities and powers of attorney.
- Advise fiduciaries on the administration of trusts and estates, including preparation of estate inventories and accountings, preparation of federal estate tax returns and reformation, construction and termination of irrevocable trusts.
- Advise clients on the organization, operation and termination of nonprofit corporations and trusts, including analysis of related income tax issues and governance structures.
- Obtain and maintain exemptions from federal income tax and state franchise, sales and use and ad valorem taxes for nonprofit organizations.
- Represent nonprofit corporations in obtaining tax-exempt bond financing for the acquisition, construction and operation of senior living and health care facilities.
- Plan and analyze charitable fundraising programs, including implementation and registration of charitable gift annuity programs and compliance with charitable solicitation laws.
- Analyze complex income and estate tax issues and prepare memoranda and opinion letters advising clients of relevant tax implications.
- Advise employers on compliance with income tax and ERISA requirements regarding retirement plans, executive compensation and other employee benefits.

ARTHUR ANDERSEN, L.L.P., Houston, TX May 1994-November 1998
Tax Manager.

- Created and evaluated financial plans including estate, investment and retirement plans.
- Presented financial planning workshops to over 1,000 employees of a Fortune 500 company.
- Analyzed complex income and estate tax issues and advised clients of relevant tax implications.
- Reviewed and prepared individual, trust, nonprofit and partnership tax returns.

LAW SCHOOL AND UNIVERSITY SERVICE

- Member of the Technology and Law Library Committee (2017-present)
- Member of the Academic Civil Rights Investigation Committee (University Committee) (2014-present)
- Member of the Faculty Appointments Committee (elected by faculty) (2015-2017)
- Member of the Faculty Governance Committee (elected by faculty) (2007-2017); Chairperson (2011-2017)
- Member of the Tenure Committee (2011-present); Chairperson (2015-2016)
- Member of the Promotion and Tenure Advisory Committee (elected by faculty) (2014-2016); Chairperson (2015-2016)
- Member of the Student Conduct Panel (2014-2017); Chairperson of student conduct hearings (2014-2016)
- Member of the Adjunct Faculty Committee (2013-2014)
- Member of the Law School Policies Transition Committee (2012-2013); Chairperson (2012-2013)
- Member of the Faculty Development Committee (2011-2012)
- Member of the Strategic Planning Committee (2011-2012)
- Member of the Academic Standards Committee (2010-2012)
- Member of the Frederic White Faculty Scholarship Award Selection Committee (2011-2012)
- Member of the Centers & Certificate Programs Committee (2010-2012)
- Member of the AALS Self-Study Committee (2010-2011)
- Member of the Curriculum Committee (2009-2010)
- Member of the Admissions Committee (2009-2010)
- Member of the Steering Committee for the Center for the Practice of Law (2007-2009)

- Member of the Faculty Benefits Committee (University Committee) (2008-2009; 2010-2012); Chairperson (2011-2012); Secretary (2008-2009)
- Faculty Council Representative (University Committee) (2011-2013)
- Member of the Student Affairs Committee (University Committee) (2006-2007)
- Co-Organizer of the Junior Faculty Workshop Series (2008-2011) (monthly forum for untenured faculty to discuss works-in-progress)
- Co-Faculty Advisor for the Tax and Estate Planning Student Organization (2006-2013)
- Faculty Advisor for the Estate Planning Concentration (2010-present)

PROFESSIONAL ASSOCIATIONS

AMERICAN BAR ASSOCIATION – Member: Real Property, Probate & Trust Law and Taxation Sections

AMERICAN ASSOCIATION OF LAW SCHOOLS – Member: Section on Trusts & Estates, Nonprofit Law and Philanthropy Section, and Taxation Section

- Treasurer and Executive Committee Member of the Section on Trusts & Estates (2018)
- Newsletter Editor/Secretary and Executive Committee Member of the Section on Trusts & Estates (2017)

STATE BAR OF TEXAS – Member: Real Estate, Property & Trust Law and Taxation Sections

- Chairperson of the Tax-Exempt Organizations Committee of the Tax Section (2011-present)
- Member of the Planning Committee for the Governance of Nonprofits Organizations Course (2016-present)
- Member of the Decedent's Estates Legislative Drafting Committee (2013-2015)

TAX EXEMPT/GOVERNMENTAL ENTITIES COUNCIL – Member

- Member of the EO Program Committee (2016-present)

TARRANT COUNTY BAR ASSOCIATION – Member