

Donald O. Jansen

I. PROFESSIONAL RESUME

Senior Partner (Retired), Fulbright & Jaworski L.L.P., Houston, Texas. Member of Tax Department. September 19, 1966, to December 31, 2005. Partner since June 1, 1975.

U.S. Army Judge Advocate General Corps, Captain, 1963-1966.

EDUCATION

- B.B.A., Loyola University, New Orleans (1961 Magna Cum Laude), First in Business Class
- J.D., Loyola University, New Orleans (1963 Cum Laude), First in Law Class, Editor-in-chief Loyola Law Review, member national moot court team
- LL.M., Georgetown University, Washington, D.C. (1966)

LEGAL SPECIALTIES

Employee benefits, probate and estate planning, tax:

- Employee Benefits (since 1984) – experience with welfare and pension plans with particular expertise in voluntary employee benefit associations, flexible benefit plans, COBRA requirements, split dollar life insurance contracts, qualified and nonqualified deferred compensation, rabbi and secular trusts and life insurance in retirement planning.
- Estate Planning and Probate (since 1967) – experience in preparation of wills, powers of attorney, management trusts, life insurance trusts; preparation of federal estate, gift and generation-skipping tax returns; handling guardianships and probate matters including independent and dependent administrations with particular expertise in life insurance in estate planning.

PROFESSIONAL ORGANIZATIONS

- **American Bar Association** – member of Sections of Taxation and of Real Property, Probate and Trust Law; past Chairman of Committee of Significant Current Literature, Probate and Trust Law Division; past Vice Chairman of Insurance Committee, Probate and Trust Law Division.
- **Federal Bar Association** – past President, Houston Chapter; past National Deputy Chairman, Younger Lawyers' Committee; past member of National Council.
- **State Bar of Texas** – Certified Specialist in Estate Planning and Probate Law by the Texas Board of Legal Specialization; member of Sections of Taxation and of Real Estate, Probate and Trust Law; past Probate Editor of Newsletter of Real Estate, Probate and Trust Law Section.
- Fellow, **American College of Trust and Estate Counsel** – Past Chairman, Life Insurance Subcommittee of Estate and Gift Tax Committee.
- Fellow, **American College of Tax Counsel**
- **Louisiana State Bar Association**
- **Houston Bar Association** – member and former Director of Probate, Trust and Estate Section.

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- **Houston Estate and Financial Forum.**
 - **Houston Business and Estate Planning Council.**
 - **Delta Theta Phi Law Fraternity**, past Treasurer and Vice-Dean Houston Alumni Chapter
 - Former legal counsel for **Houston Junior Chamber of Commerce.**
 - **Texas Academy of Probate and Trust Lawyers**
 - **College of the State Bar of Texas**
 - Who's Who in American Law.
 - *Texas Super Lawyers 2003, 2004 and 2005 Texas Monthly Magazine*
 - **Advisory Committee, Heckerling Institute on Estate Planning**, University of Miami Law School

PUBLICATIONS

Contributing author on income, estate, gift and generation-skipping tax subjects.

- Trusts & Estates Magazine
- CCH Financial and Estate Planning
- CCH Federal Tax Service
- ABA Real Property, Probate & Trust Journal
- American Society of CLU & ChFC, Keeping Current (tape series)
- Georgetown Law Journal
- Loyola Law Review
- Texas Transaction Guide, Matthew Bender
- American College of Trust and Estate Counsel, "ACTEC Journal"
- The Insurance Counselor Series, Real Property, Probate, and Trust Law Section, American Bar Association

SPEAKING ENGAGEMENTS

Nationally recognized speaker on income, estate, gift and generation-skipping tax subjects before many organizations and institutes, including:

Tax Institutes:

- Notre Dame Estate Planning Institute
- Tulane Tax Institute
- Philip E. Heckerling Institute on Estate Planning, University of Miami
- Mississippi Tax Institute
- Alabama Federal Tax Clinic
- Institute on Wills and Probate, Southwestern Legal Foundation
- SMU Estate Planning Symposium
- University of Texas Taxation Conference
- Conference on Advanced Planning, International Association of Financial Planning
- Annual Estate Planning Seminar, Corpus Christi Estate Planning Council
- Estate Planning Conference, South Texas College of Law

- Loyola University Estate Planning Conference
- Hawaii Institute for Continuing Legal Education, Annual Financial and Estate Planning Seminar
- Conference of Consulting Actuaries, Annual Meeting
- American Association of Attorneys – Certified Public Accounts, Annual Meeting

Bar Associations:

- Advanced Estate Planning and Probate Course, State Bar of Texas
- ALI-ABA Seminar on Tax Reform Act of 1984
- Annual and Spring meetings, Real Property, Probate and Trust Law Section, American Bar Association
- Winter and Spring meetings, Section of Taxation, American Bar Association
- Estate Planning Seminar, Washington State Bar and Estate Planning Council of Seattle
- Probate, Trust and Estate Section, Dallas Bar Association
- Probate, Trust and Estate Section, Houston Bar Association
- Brazoria County Texas Bar Association
- Continuing Legal Education Institute, Houston Bar Association
- Houston Chapter, International Estate Planning Council
- Annual meetings, American College of Trust and Estate Counsel
- Advanced Drafting, Estate Planning and Probate Conference, State Bar of Texas
- Advanced Tax Course, State Bar of Texas
- Association of the Bar of the City of New York
- Advance Estate Planning Strategies Seminar, State Bar of Texas

Other Professional Groups:

- American Society of Chartered Life Underwriters (CLU) & ChFC Institutes and National Video Conference
- Million Dollar Round Table
- Association for Advanced Life Underwriting (AALU) annual meetings
- New York Life Insurance Company National Video Conference
- Dallas Chapter of CLU & ChFC
- Houston Chapter of CLU
- Houston Association of Life Underwriters
- Super Summit, Alexander Hamilton Life Insurance Company
- Annual Estate Planning Seminar, Houston General Agents and Managers Association
- CLU Chapter, Wichita, Kansas
- Atlanta Chapter CLU
- President's Council and Chairman's Council, New York Life Insurance Company
- Texas Leaders Round Table
- Semi-Annual Meeting, Todd Organizations
- Partners Group (Houston)
- Aetna Life Insurance Company, Advanced Sales Seminar
- M Financial Group
- Security Life of Denver, Advanced Marketing Forum

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- Equitable Life Insurance Company Education Institute
 - Chubb Life Companies, Seminar for Valued Producers
 - Society of Financial Service Professionals, annual meeting
 - General American Life Insurance Company, Top Gun Conference
 - American General Financial Group
 - Massachusetts Mutual Life Insurance Company, Blue Chip Conference
 - Advanced Estate Planning Conference, Texas Society of CPAs
 - Annual Tax Conference, Kansas Society of CPAs
 - Houston Chapter, Texas Society of CPAs
 - Dallas Chapter, Texas Society of CPAs
 - Texas Society of CPA, Annual Tax Institute

Estate Planning Councils:

- Chattanooga Tax Practitioners
- Baltimore Estate Planning Council
- Cincinnati Estate Planning Council
- St. Louis Estate Planning Council
- New Orleans Estate Planning Council
- Philadelphia Estate Planning Council
- Southern Nevada Estate Planning Council
- San Antonio Estate Planners Council
- Houston Estate and Financial Forum
- Fort Worth Business and Estate Council
- Houston Business and Estate Planning Council
- Victoria Texas Estate Planning Council
- Brazos Valley Texas Estate Planning Council
- Austin Estate Planning Council
- Jefferson County Texas Estate Planning Council
- Beaumont Texas Estate Planning Council
- San Angelo Texas Estate Planning Council
- South Plains Trust and Estate Council, Lubbock, Texas
- Waco Texas Estate Planning Council
- Amarillo Texas Estate Planning Council
- Dallas Estate Planning Council
- Southeast Texas Estate Planning Council
- North Texas Estate Planning Council

II. CIVIC

- Eagle Scout
- Regional Finalist, 1972 White House Fellows Competition
- Outstanding Young Men of America, 1972 and 1975
- Outstanding Young Texans, 1976
- President, Congressman Bill Archer's High School Student Intern Foundation (1971 – 2001)

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- Director, Texas Bill of Rights Foundation, 1975-1977
 - Houston Jaycees, Director and Legal Counsel (1969-1971)
 - President's Council, Loyola University, New Orleans (1979-1989)
 - Boy Scouts of America, Scoutmaster Troop 673 (1977-1978); Assistant Scoutmaster Troop 673 (1976-1977, 1978-1979) and Troop 852 (1990); Cubmaster Pack 558 (1984-1985); Committee Chairman Pack 558 (1983-1984) and Troop 852 (1986-1988); Chairman of Sam Houston Area Council Delegation for report to Governor (1977)
 - Chairman, City of Houston Ethics Committee (1989-1991)
 - American Cancer Society, Greater Houston Unit Director (1969-1975, 1977-1979), Legacies Chairman (1973, 1978), Memorial Chairman (1974), Downtown Crusade Chairman (1968); Member Texas Planned Giving Committee (1977-1978); Member Texas Legacy and Memorial Committee (1974-1977)
 - Member, Mayor's Advisory Committee on Houston Mass Transportation (1972-1973)
 - St. Agnes Academy of Houston, Advisory Director (1975-1978) and member of Finance Committee
 - Spring Shadows Civic Association, Director (1970-1972)
 - Member, Mayor's Advisory Committee on Houston Mass Transportation (1972-1973)
 - Member, Board of Adjustment, Hedwig Village (1980-1983)
 - St. Michael Catholic Church, Lector (1995-present)
 - Member, Planned Giving Committee, Roman Catholic Diocese of Galveston-Houston (2000-present)
 - Chairman, General Provisions Committee, Houston Citizens Advisory Committee to the Texas Constitutional Revision Commission, 1973
 - Board of Directors, Swedish Club of Houston (2002-2004)