

TEXAS AUSTIN



Leslie C. Giordani
*Giordani, Schurig,
Beckett & Tackett*
100 Congress Avenue,
22nd Floor
Austin, TX 78701
Tel: 512-370-2731
Fax: 512-370-2730

Leslie Giordani represents high net worth individuals and family offices in the design and implementation of domestic and offshore trust, investment, and life insurance structures. She also consults to financial service providers on such matters. A frequent author and speaker in the areas of private placement life insurance, asset protection, and foreign trust planning, Ms. Giordani is often interviewed and quoted in financial publications. She participates regularly as a faculty member of the University of Miami's Heckerling Institute on Estate Planning, the ALI-ABA semi-

nar on International Trust and Estate Planning, State Bar of Texas advanced estate planning seminars, and chairs the annual IIR/IBC conference on *Hedge Fund Investing Through Life Insurance and Annuities*.

Education: University of Houston Law Center (J.D., cum laude, 1990) - Order of the Coif, - Articles Editor, *Houston Law Review*; Wayne State University (B.S.N., high distinction, 1983)

Professional Affiliations and Honors: Board Certified, Estate

Planning and Probate Law (Texas Board of Legal Specialization); American Bar Association; State Bar of Texas; College of the State Bar of Texas; Fellow, American College of Trust and Estate Counsel (ACTEC); Investment Management Consultants Association, Advisory Council; Association for Advanced Life Underwriting; Listed in *The Best Lawyers in America*; Texas Super Lawyer (2003-2005)

G S B T

TEXAS AUSTIN



Elizabeth M. Schurig
*Giordani, Schurig,
Beckett & Tackett*
100 Congress Avenue,
22nd Floor
Austin, TX 78701
Tel: 512-370-2732
Fax: 512-370-2730

Elizabeth Schurig's practice involves the design, implementation, and administration of multinational estate and wealth preservation plans including international trust and related business, investment, and life insurance structures, including the tax planning and compliance aspects of such structures. A frequent author and speaker in the areas of domestic and international estate planning, asset protection, and foreign trust planning, Ms. Schurig has written numerous articles and has been listed in various publications, including *Practical Accountant* and *Bloomberg Wealth Manager*. Ms.

Schurig is an author and editor of the four-volume treatise, *Asset Protection: Domestic and International Law and Tactics* (Thomson/West Group, updated quarterly), and has authored "A Closer Look at U.S. Asset Protection Trusts," *Asset Protection Strategies Vol. II*, Ed. Alexander A. Bove, Jr.

Education: University of Texas School of Law (J.D., 1988); Baylor University (B.A., 1984)

Professional Affiliations and Honors: Board Certified, Estate Planning and Probate Law (Texas

Board of Legal Specialization); American Bar Association; State Bar of Texas; Austin Bar Association; College of the State Bar of Texas; Fellow, Texas Bar Foundation; Fellow, Texas Academy of Probate and Trust Lawyers; Founding Fellow, Travis County Bar Foundation; Investment Management Consultants Association - Faculty; Listed in *The Best Lawyers in America*; Texas Super Lawyer (2003-2005)

G S B T

TEXAS AUSTIN



Derry W. Swanger
*Giordani, Schurig,
Beckett & Tackett*
100 Congress Avenue,
22nd Floor
Austin, TX 78701
Tel: 512-370-2752
Fax: 512-370-2730

Derry Swanger assists U.S. and foreign individuals with the design and implementation of sophisticated estate planning and asset protection strategies, and advises clients about charitable giving issues and the creation of tax-exempt organizations, including public charities, private foundations, and private operating foundations. Mr. Swanger also works extensively with individual and corporate executors and trustees, advising them with respect to the tax and non-tax issues associated with the administration of estates and trusts, and is experienced

in the judicial construction, reformation, modification, and termination of trusts.

Education: Southern Methodist University School of Law (J.D., 1984); University of Texas at Austin (B.B.A., Accounting, with highest honors, 1981)

Professional Affiliations and Honors: Board Certified, Estate Planning and Probate Law (Texas Board of Legal Specialization); American Bar Association - Real Property, Probate and Trust Law

Section, and Taxation Section (Past Chair, Estate and Gift Tax Committee); State Bar of Texas - Real Property, Probate and Trust Law and Taxation Sections; Austin Bar Association; Fellow, American College of Trust and Estate Counsel (ACTEC); Listed in *The Best Lawyers in America*; Texas Super Lawyer (2003 - 2005) - Recognized as a Top 50 Super Lawyer, Central/West Texas (2005)

G S B T

TEXAS AUSTIN



Steven J. Tackett
*Giordani, Schurig,
Beckett & Tackett*
100 Congress Avenue,
22nd Floor
Austin, TX 78701
Tel: 512-370-2734
Fax: 512-370-2730

Steve Tackett's practice covers all aspects of estate planning, probate, and transfer tax law, including the design and implementation of traditional and non-traditional estate plans for both U.S. and non-U.S. clients, and the probate of Wills and the determination of heirship of decedents dying without Wills. Mr. Tackett is highly experienced in mediation of probate disputes and in the judicial construction, reformation, modification and/or termination of trusts and in the administration, settlement, and distribution of estates and trusts. Mr. Tackett

represents clients with tax controversies pending before the Internal Revenue Service and in the preparation, examination, and appeal of federal estate, gift, and generation-skipping transfer tax returns.

Education: University of Texas School of Law (J.D., 1971); University of Texas at Austin (B.A., 1968)

Professional Affiliations and Honors: Board Certified, Estate Planning and Probate Law (Texas Board of Legal Specialization); American Bar Association; State Bar

of Texas; Austin Bar Association; College of the State Bar of Texas; Admitted United States Tax Court, 1985; Fellow, American College of Trust and Estate Counsel (ACTEC); Fellow, Texas Academy of Probate and Trust Lawyers; Founding Fellow, Travis County Bar Foundation; Court Qualified Impartial Third Party (Mediator); Listed in *The Best Lawyers in America*; Texas Super Lawyer (2003-2005)

G S B T