

## LESLIE C. GIORDANI

**Leslie Giordani** primarily represents ultra high net worth individuals and family offices in the design, implementation, and administration of domestic and international trust, investment, and life insurance structures. She also consults generally to major financial institutions and boutique financial service providers on matters of interest to the ultra high net worth marketplace. Ms. Giordani is board certified in Estate Planning and Probate Law (Texas Board of Legal Specialization), is listed in *The Best Lawyers in America*, and is a Fellow of the American College of Trust and Estate Counsel (ACTEC).

A frequent author and speaker in the areas of life insurance, asset protection, and foreign trust planning, Ms. Giordani serves as a contributing author of the four-volume treatise, *Asset Protection: Domestic and International Law and Tactics* (Thomson/West Group, updated quarterly), and has also been quoted in various publications, including *The Wall Street Journal*, *HedgeWorld's Inside Edge*, *Absolute Return*, and *Fundfire.com*. She is a frequent speaker at educational forums in the areas of estate planning, tax, investments, and life insurance.

### 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., with high distinction, 1983)

### Professional Affiliations and Honors

Board Certified, Estate Planning and Probate Law (Texas Board of Legal Specialization)  
 American Bar Association  
 - Taxation Section  
 - Real Property, Probate and Trust Law Section  
 - International Law and Practice Section  
 State Bar of Texas  
 College of the State Bar of Texas  
 Estate Planning Council of Central Texas  
 American College of Trust and Estate Counsel, Fellow  
 Investment Management Consultants Association, Advisory Council Member  
 Listed in *The Best Lawyers in America*  
 Texas Super Lawyer (2003 through 2008)  
*Texas Monthly* and *Law & Politics* magazines

### Books and Treatises

*Asset Protection: Domestic and International Law and Tactics*, Thomson/West Group (four volumes, updated quarterly)

### Professional Publications (Selected)

"Private Placement Life Insurance Planning," ALI-ABA Estate Planning Course Materials Journal (June/August 2006)  
 "Investing in Hedge Funds Through Private Placement Life Insurance," The Journal of Investment Consulting (Winter 2003/2004)

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- “Recent Developments Affecting Hedge Fund Investing Through Private Placement Life Insurance,” *The Insurance Tax Review* (October 2003)
- “Investing in Hedge Funds Through Domestic and Offshore Private Placement Life Insurance,” *Shorex’s Offshore Today.com* (April/June 2003)
- “Offshore Life Insurance Planning for United States Clients,” *ACTEC Notes* (Summer 2000)
- “Domestic Venues for Asset Protection Trusts,” *Papers of the International Academy of Estate and Trust Law* (Rosalind F. Atherton ed., Kluwer Law International, 2000)
- “Stateside Asset Protection Trusts,” *Estate and Personal Finance Planning*, West Publishing (December 1997)
- “Will the Alaska Trusts Work?” *Journal of Asset Protection* (September/October 1997)
- “The Preliminary Decisions in Offshore Trust Planning,” *Journal of Asset Protection* (July/August 1996)
- “Asset Protection Using Offshore Trusts,” *American Bar Association Spring Meeting* (May 1996)
- “The US Tax Compliance Act of 1995,” *The OFC Report* (1995/1996)
- “A Cost Containment Malpractice Defense: Implications for the Standard of Care and for Indigent Patients,” *Houston Law Review* (1989)

### **Professional Presentations (Selected)**

- “Private Placement Life Insurance in the Offshore Marketplace,” *Eleventh Annual Advanced ALI-ABA Course of Study for Counselors to Foreign and U.S. Clients* (Santa Fe, New Mexico; July 2008)
- “Gaining Preferential Tax Benefits On Your Investments Via Private Placement Life Insurance,” *15<sup>th</sup> Annual Family Office Forum* (Chicago, Illinois; June 2008)
- “Lessons from the Field: Protecting your Clients from Diversification Failures and Investor Control,” *IIR 6th Annual Event: Alternative Investing Through Life Insurance and Annuities* (Miami, Florida; February 2008) (Chair of the Planning Committee and Panelist)
- “Deploying Alternative Investing Strategies via PPLI,” *The 14<sup>th</sup> Annual Family Office Forum* (Chicago, Illinois; June 2007)
- “Investor Control In Depth: Analysis with Case Examples,” *IIR 5<sup>th</sup> Annual Event: Alternative Investing Through Life Insurance and Annuities* (Miami, Florida; February 2007) (Co-Chairman and Panelist)
- “Selecting the Right Life Insurance in a Growing Menu of Options,” *7<sup>th</sup> Annual Family Office Wealth Conference* (Laguna Beach, California; September 2006)

- “The Role of Consultants and Advisors in Maximizing PPLI Performance and Client Satisfaction,” and “Private Placement Life Insurance, Annuity, and Hedge Fund Products – Understanding the Tax and Product Basics,” IIR 4<sup>th</sup> Annual Event: Hedge fund Investing Through Life Insurance and Annuities (Coconut Grove, Florida; February 2006)
- “Offshore Private Placement Life Insurance,” American Law Institute – American Bar Association International Trust and Estate Planning Conference (Seattle, Washington; August 2005)
- “Hedge Fund Investing through Life Insurance and Annuities,” IBC’s 3<sup>rd</sup> Annual National Event (New York, New York; June 2005) (Chairman and Speaker)
- “Private Placement Life Insurance: Friend or Foe?” FOX Wealth Advisor Conference (Coconut Grove, Florida; February 2005)
- “Foreign Insurance Products,” American Law Institute – American Bar Association International Trust and Estate Planning Conference (Toronto, Canada; August 2004)
- “Hedge Fund Investing Through Life Insurance,” IBC’s 2<sup>nd</sup> Annual National Event (New York, New York; June 2004) (Chairman and Speaker)
- “Absolute Return Investing with Greater Tax Efficiency Through Private Placement Life Insurance,” IMCA’s Spring Development Conference, “Measuring Consultants’ Alpha” (Boca Raton, Florida; April 2004)
- “Hedge Fund Investing Through Life Insurance,” IBC’s Inaugural Event (New York, New York; April 2003) (Chairman and Speaker)
- “Identifying the Market For and Uses of Private Placement Life Insurance,” IBC’s Inaugural Event– Hedge Fund Investing Through Life Insurance (New York, New York; April 2003)
- “Advanced Investments in Life Insurance Strategies – Use of Hedge Funds in Offshore Private Placement Life Insurance,” M Financial Group 2003 National Advisors Conference (Tucson, Arizona; February 2003)
- “Offshore Trust Planning: Use of Hedge Funds in Offshore Private Placement Life Insurance,” ABA Section of Taxation, 2003 Midyear Meeting (San Antonio, Texas; January 2003)
- “Advanced Investments in Life Insurance Strategies – Use of Hedge Funds in Offshore Private Placement Life Insurance,” The 37<sup>th</sup> Annual Philip E. Heckerling Institute on Estate Planning (Miami Beach, Florida; January 2003)
- “Implementing an Offshore Life Insurance Strategy,” Insurance Distributors International (Bermuda) Ltd. 2002 Conference (Paget, Bermuda; July 2002 and September 2001)
- “Complex Estate Planning Techniques for the Ultra High Net Worth Client,” APIC 12<sup>th</sup> Annual Educational Conference (San Antonio, Texas; May 2002)

- “Advanced Investment and Life Insurance Strategies,” State Bar of Texas Advanced Estate Planning Strategies Course (Santa Fe, New Mexico; April 2002)
- “Planning with Private Placement Life Insurance,” Wealth Counsel Study Group Meeting (St. Louis, Missouri; September 2001)
- “Asset Protection: Domestic and Foreign Planning Alternatives,” AICPA Advanced Estate Planning Conference (Chicago, Illinois; July 2001)
- “What's New in Life Insurance? Offshore and Domestic Private Placement; Creative Split Dollar Funding,” The 35th Annual Philip E. Heckerling Institute on Estate Planning (Miami, Florida; January 2001)
- “Offshore Life Insurance Planning,” American Law Institute - American Bar Association International Trust and Estate Planning Conference (San Francisco, California; August 2000)
- “Design of a Cross Border Insurance or Annuity Product for the Private Client,” American Bar Association/International Bar Association International Wealth Transfer Practice Conference (London, England; March 2000)
- “Estate Planning with Offshore Annuities & Life Insurance for World Citizens -- A Case Study Panel Discussion,” Institute for International Research (New York, New York; November 1999)
- “Asset Protection: Domestic and Foreign Planning Alternatives,” Thirty-Third Annual Southern Federal Tax Institute (Atlanta, Georgia; October 1998)

### **Contact Information**

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