Curriculum Vitae of
PHILIP R. FEIST
2024

Professional Career

Current –	Heirline Legal Services PLLC, partner
Previous –	GableGotwals, partner
	Doerner Saunders Daniel & Anderson, partner
	Fellers Snider Blakenship & Bailey, partner

Legal Education

Juris Doctor	University of San Diego School of Law, 1991

Undergraduate

Bachelor of Arts	University of California, Davis, 1971

Graduate (non-legal)

Master of Theology	Dallas Theological Seminary, 1975

Bar Admissions

April, 1992	State of Oklahoma; status: active
December, 1992	State of California; status: inactive
September, 1995	State of Kansas; status: inactive
November, 1996	Territorial Court of the U.S. Virgin Islands; status: inactive
June, 2009	State of Florida; status: active
August, 2012	State of Texas; status: active

Certifications

September, 1999	Certified Specialist in Estate Planning, Trust and Probate Law, by the State Bar of California Board of Legal Specialization; status: certificate retired, 2024

Professional Memberships

Texas Bar College
Estate Planning, Probate and Trust Section, Oklahoma Bar Association
Trusts and Estates Section, State Bar of California
Real Property, Probate and Trust Law Section, Florida Bar Association
Real Estate, Probate and Trust Section, Texas State Bar
Los Angeles County Bar Association
Dallas County (Texas) Bar Association
Tulsa County (Oklahoma) Bar Association
American Bar Association, Real Property, Trusts and Estates Section

Mediation Training

Basic Course	Los Angeles County Bar Association, 2007
Advanced Practicum	Los Angeles County Bar Association, 2007

Awards and Honors

Martindale Hubbell AV Preeminent® Rating
Oklahoma Super Lawyer
Oklahoma Best Lawyer
President’s Award, 2015 & 2016, Tulsa County Bar Association

Military Service
LT, U.S. Navy (reserve) Honorable Discharge 1983

Community Leadership and Activities
Advisory Board Member, Little Light House, Tulsa OK

Legal Presentations:

"The Oklahoma Series LLC"
Tulsa County Bar Association, May, 2007

"The Oklahoma Family Wealth Preservation Trust and the Foreign Grantor"
Tulsa Tax Club, March, 2008

"Using Series LLCs in Oklahoma Estate Planning"
Tulsa County Bar Associationm December, 2011

Course: Wills, Trusts and Probate
Adjunct Professor, Northeastern State University, Fall Semester, 2014

"The Revocable Asset Preservation Trust: New Planning Horizons from Oklahoma – Ethical Issues in Preservation Trust Drafting"
Oklahoma Bar Association, March, 2015

"Estate Planning Processes and Practice"
Tulsa County Bar Association

"Estate Planning Practice Management Series"
Tulsa County Bar Association
12-Part Series; taught in 2015, 2016 & 2017
  Dealing with: Estate Planning Professional Ethics; Basic Plan Documents: Issues and Elements; Trusts: Essential Elements; Trusts: Drafting for Trustee and Administration Issues; Trusts: Drafting for Beneficiary Issues; Trusts: Drafting for Asset Issues; Trusts: Drafting for Tax Issues; Lifetime Wealth Transfers; Asset Protection Planning; Post-Mortem Planning; Probate Administration Issues; Probate Litigation

"Tax-Sensitive Estate Planning Series"
Tulsa County Bar Association
4-Part Series; taught in 2016 & 2017
  Dealing with: Tax Deferral, Income Shifting, Transfer Tax Avoidance, and Basic Step-Up through Tax-Sensitive Estate Planning

“The Other Family Tree: Care and Protection for the Family Enterprise in Transition”
Tulsa County Bar Association
4-Part Series: taught in 2016 & 2017

Dealing with: Legal Root Structures: Opportunities and Limitations of Different Family Entity Structures; Keeping the Enterprise Viable: Transferring Control; Insiders and Outliers: Treating All Children Fairly; Turning Paper into Gold: Cash Flow to Transitioning Owners

“White Water Estate Planning: Asset Planning to Survive to the Next Generation”
4-Part Webcast Series
Oklahoma Bar Association, in September 2018

“Through the Shadow Lands of Mordor: Drafting an Effective Asset Protection Trust”
3-Part Webcast Series
Oklahoma Bar Association, in October, November, December 2017

“Advanced Asset Protection from Oklahoma”
3-Part Webcast Series
Oklahoma Bar Association, in October, November, December 2016

“Fortress Oklahoma: Asset Preservation Trust Planning for Oklahoma Lawyers”
3-Part Webcast Series, in October, November, December 2015

Asset Protection Planning Updates Series, Oklahoma Bar Association
5-part Webcast CLE Series
Sept 2, 2019 :
“Retirement Account Protection Planning”
Sept 9, 2019:
“The Oklahoma Tort Protection Levee Is Gone”
Sept 16, 2019:
“Still the Best: Oklahoma’s Preservation Trust in Action”
Sept 23, 2019:
“Tax Tango: Basic Income and Transfer Tax Efficiency Planning”
Sept 30, 2019:
“Every Family Is A Blended Family”

2020 Asset Protection Planning Series, Oklahoma Bar Association
10-part Webcast CLE Series
Session #1:
Apples, Oranges and Cranberries: Domestic Asset Protection Trust Options Compared
Session #2:
It’s A Wonder: How the Oklahoma Family Wealth Preservation Trust Works – And It Does Work
Session #3:
The Safest Place of All: The Preservation Trust Protection Mechanism

Session #4:
A Revocable Protection Trust: Chameleon, or Chimera?
Session #5:
Letting Go, Getting To Enjoy: Settlor Access to Preservation Trust Assets
Session #6:
Captain Sully and the Oklahoma Preservation Trust: Who's At The Controls?
Session #7:
All in the Family: The Family Wealth Preservation Trust Family
Session #8:
Beyond the Paw of the Lion: Jurisdiction and the Preservation Trust
Session #9:
Guess Who's Coming To Dinner: The Preservation Trust Meets the Taxman
Session #10:
Every Garden Should Grow One: The Preservation Trust Based Estate Plan
Bonus Session:
Threading the Curl – Ethical Quicksand and Sink Holes in Asset Protection Planning

<u>Legal Publications</u>:

"Integrated Estate Planning for the Protection and Succession of the Family Business"
Oklahoma Bar Journal, January 2019

"Oklahoma's Family Wealth Preservation Trust Act: Now More Than Ever"
Oklahoma Bar Journal, November 21, 2015

Authored the update on the Oklahoma Family Wealth Preservation Trust Act, for *Asset Protection: Domestic and International Law and Tactics,* Duncan E. Osborne, ed., published by Thomson Reuters/Westlaw, and the "Oklahoma Preservation Trust Example" at Appendix A of the treatise

2017 editor for Chapters 49-53 of *Bogert's The Law of Trusts & Trustees*, published by Thomson Reuters Westlaw

2018 update editor for *Koren: Estate, Tax & Personal Financial Planning,* published by Thomson Reuters Westlaw

"Asset Protection for California Residents,"
Eastern Bar Association (Los Angeles), presented August 15, 2019, and published in *Koren: Estate, Tax & Personal Financial Planning.*