



Professional Focus

- Trust, estate and gift taxation
- Wealth transfer strategies
- Planning for death and disability
- Charitable giving
- Business succession and retirement

Professional Experience

- Joined Boulay, Heutmaker, Zibell & Co. P.L.L.P. in 1999 as a member of the tax department's estate planning group
- Partner since 2008

Education

- William Mitchell College of Law
Juris Doctorate
- University of Minnesota – Duluth
B.A. Accounting, Cum Laude

Professional Activities

- Minneapolis Estate Planning Council
- American Institute of Certified Public Accountants
- Minnesota Society of Certified Public Accountants
- American Bar Association
- Minnesota State Bar Association
- Hennepin County Bar Association