Education

MBA Dalhousie University 2003

LL. B. University of Ottawa 1981

B.A. Carleton University 1978

Other Professional Achievements

Alberta Queen's Counsel

TEP Society of Trust and Estate Practitioners

STI Specialist, Trust Institute

CFP Certified Financial Planner

Current Not-For-Profit Directorships and Memberships

American Friends of the University of Calgary, Inc.	Director and Trustee
Calgary Bar Association	Member
Canadian Bar Association, Charities Section	Alberta and National Executive
Estate Planning Council of Calgary	Member
Financial Planners Standards Council	Member
Girl Guides of Canada	Governance Committee Member and Team Lead Scholarships for Canada
Pro Bono Law Alberta	Volunteer Lawyer
Rosebud Centre of the Arts	Governor
Society of Trust and Estate Practitioners	Member
Law Society of Alberta	Member

Past Not-For-Profit Memberships and Directorships

AIDS Calgary	Board Member
Alberta Future of Work Secretariat	Task force Member
Alberta Theatre Projects Society	President
Alberta Vocational College, Business Careers	Advisory Group Member
Association of Women Lawyers	Member
Business and Professional Women's Club	Member
Calgary Association of Women & the Law	Chairperson
Calgary Chamber of Commerce	Committee Chair
Canadian Association of Disabled Skiers	Member
Canadian Association of Financial Planners	Member
Canadian Association of Gift Planners	VP Calgary Round Table (Allied Professional)
Cerebral Palsy Association	Member
CN FutureLinks Girls' Club	Volunteer Site Director
Estate Planning Council of Calgary	Member
Financial Planners Association	Member
Father Lacombe Care Centre Foundation	Trustee
Girl Guides of Canada	Guider, Adult Outdoor Leader, Safe Guide Assessor,
Leave a Legacy Calgary	Steering Committee
McKenzie Lake Community Association	Secretary and Director
McKenzie Lake Residents' Association	Secretary and Director
Successful Women Conferences	Founder and Speaker

Sunnyside Condominium Corporation	President
University of Calgary Foundation	Trustee
Women Inventors Network Society of Alberta	Founder

Publications and Presentations of Interest

Timely New Tax Topics To Consider - CRA Policies: An Overview
2014 National Charity Law Conference, Toronto ON, May 23, 2014

Planning Without Borders Part 2: Fundraising Internationally, co-presenter, *Canadian Association of Gift Planners Conference,* Vancouver BC, April 2014

Advising the Social Enterprise, Chairperson
Legal Education Society of Alberta, Fall 2013

Basic Legal and Compliance Requirement for Not-for-profit Organizations and Keeping your Not-for-profit Organization Healthy and Thriving"
Activate 2013, CGA & CMA Alberta Conference, Calgary AB, June 2013

Planning Without Borders and Finding and Receipting Non- Qualified Securities, co-presenter, *Canadian Association of Gift Planners Conference,* Gatineau PQ, April 2013

Charities, Not-For-Profit Organizations and Social Enterprise, Moderator
Canadian Bar Association Canadian Legal Conference, Vancouver BC, August 2012

Charities & Not-for profit Organization Law
CGA Alberta Conference 2012: Building on Strength, Edmonton AB, June 2012

New Ineligible Director Rules
CBA Charities Law Section, Calgary AB, March 2012

Advising Charities and Not-for-Profit Organizations, Session Chairperson
Legal Education Society of Alberta, Winter 2012

BILL C-28, The new anti-spam law CCVO June 2011
CCVO Senior Finance Officer Working Group, Calgary AB, June 2011

Investment Powers - A comparison of Jurisdictions for Charitable Organizations, *Canadian Bar Association Canadian Legal Conference* (Niagara Falls On, August 2010)

Fiduciary Duties
Aboriginal Trust and Investment Workshop, Kelowna B.C., May 2010

Estate Planning and the Business of Family Philanthropy
Estates, Trusts and Pensions Journal (2009) 28 E.T.P.J., 317

Reclamation Trusts
Aboriginal Trust and Investment Workshop, Edmonton AB, May 2009

The Family Business of Philanthropy
Canadian Association of Gift Planners Conference, Niagara Falls ON, April 2009

Charitable Gift Planning 101
Canadian Association of Gift Planners Seminar, Calgary AB, April 2009

Private Foundations
Society of Trust and Estate Practitioners, Edmonton AB, June 2008

Private Foundations
Canadian Association of Gift Planners Conference, Vancouver B.C., April 2008

Planned Giving 101
Blackbaud's 2008 Conference For Nonprofits, Montreal PQ, April 2008

What Investment Powers Does a Charity Really Have?
Blackbaud's Conference for Nonprofits, Charleston SC, November 2007

Financial Mentors
The Lawyers Weekly, November, 2007

Personal Finances Discovering our Core Values
Association of Women Lawyers Newsletter, Winter 2006

Pros & Cons of Trust Companies
Estate planning seminar series, Richardson Partners Financial Limited
Calgary AB, November 2006

Alberta Charitable Fundraising Act
Charity Talk newsletter, October 2006

What Price, Advice?
The Canadian Centre for Elder Law Studies Canadian Conference On Elder Law
Vancouver B. C., October 2006

A new instrument for the regulation of solicitations: the Alberta Charitable Fundraising Act
Charity Law Newsletter, Fall 2006

Trust Companies: Pros and Cons of Trust
Leave A Legacy Seminar Series, Calgary AB, May 2006

Donor's rights and remedies
Fourth National Symposium on Charity Law, Toronto ON, May 2006

The Marketing of Financial Services to the Elderly - What we need to know to protect our clients?
Planning for Later Life, Part II: Legal, Financial, and Marketing Solutions Canadian Bar Association Continuing Legal Education, Ottawa ON, March 2006

Protecting the Elder Client
Step Inside, Newsletter of the Society of Trust and Estate Planners, (Canada) Spring 2006

Wise and Wealthy Women panel
Financial Forum-Educating Today's Investors, Calgary AB, November 2005

Estate Planning and Charitable Giving
Money talk, Calgary AB, November 2005

Aging and the Role of Trust in our Society
The Canadian Centre for Elder Law Studies Canadian Conference On Elder Law
Vancouver B. C., October, 2005

Life Planning - Are we there Yet?
Association of Women Lawyers Newsletter, Fall 2005

Building Philanthropy into your Client's Plan
The Calgary Foundation's Focus on Philanthropy Newsletter, June 2005

Financial Planning for Non- Financial Planners
Planning for Later Life; Legal, Financial & Social Challenges, Canadian Bar Association Continuing Legal Education, Toronto ON, May 2005

Your personal makeover plan - It's a matter of Life and Death
Kerby News, September 2004

Non-profit for profit
Canadian Bar Association Canadian Legal Conference, Winnipeg MB, August 2004

We Are Waiting For Someone To Ask Us
Canadian Association of Gift Planners Conference, Toronto ON, April 2004

The Great Philanthropy Trading Game
Canadian Association of Gift Planners, Calgary AB, February 2004

My Top 10 Reasons Why I love Philanthropy
Focus on Philanthropy, *The Calgary Foundation*, Calgary AB, November 2003

Charitable Remainder Trust - What Is It?
Leave A Legacy Workshop, Calgary AB, May 2003