



Leslie Kiefer Amann

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Education

University of Houston Law Center, JD and admitted to practice law 1987; Texas State University, BA Music, Education and TX Secondary Teacher Certificate, 1976; additional graduate work, University of Texas 1977-78.

Completed Texas Trust School 1995; Ad Litem Training Certification 1996 and 1998; Held Securities Licenses, Series 6 and 63, 1997-2001. Currently licensed and in good standing State Bar of Texas. Previously admitted to practice in the United States District Court, Southern and Northern Districts of Texas, and United States Court of Appeals, Fifth Circuit. ACTEC Fellow (Fiduciary Counsel) since 2018. NAEPC Accredited Estate Planner since 2007.

Professional Experience (In Houston unless otherwise noted.)

- 2021 - Practicing Attorney and Of Counsel to Sentinel Trust Company – retired from active employment at Sentinel but I consult, write, and lecture on fiduciary administration and estate planning topics across the state and nationally for Sentinel, private clients and other professional organizations.
- 2006-2020 Chief Fiduciary Officer and Senior Vice President at Sentinel Trust Company – served clients with highly-complex fiduciary needs providing guidance and oversight for the governance of family entities for large family relationships and their individual members. Worked with clients' advisors on probate, trust, estate planning, and family management documents, and to choose and effect documents for entity formation and administration including for investment, real estate transactions, and charitable giving. Provided firm wide training for client service and administrative teams, compliance, and worked to ensure consistency and best practices where Sentinel Trust was named trustee, executor, or agent.
- 1995-2006 Senior Vice President and Market Trust Executive (2002 – 2006) Trust Team Lead and Fiduciary Counsel; Bank of America, N. A. (1997 – 2002); Assistant General Counsel, Vice President and Trust Officer, Charter Trust Company, a subsidiary of NationsBank of Texas, N. A., formerly Charter National Bank - Houston, Asset Management and Trust Services, and agent, Southwest Guaranty Trust Company, N.A. (1995 – 1997). Responsibilities included management of a team of trust administrators located in 8 offices across three states with ~\$6 billion under management and providing personal trust administration; court created trusts; marketing; financial and planning advice; compliance; real estate management; fiduciary litigation, and risk management.
- 1984-1994 Law Firm Experience includes Shareholder, Cunningham Burke Amann & Brooks, PC, a general business litigation firm (formed as Cunningham & Amann). Participating Associate, Associate, and Briefing Clerk, in a series of firms headed by Joe H. Reynolds, beginning with Reynolds Allen & Cook and ending with Reynolds & Cunningham. During my time in private law practice, I focused on complex business litigation including significant experience in fiduciary issues in banking, business, and energy litigation. Conducted successful jury trials in state and federal courts; appellate

experience includes briefing and oral argument resulting in published opinions in Texas Courts of Appeals and the United States Court of Appeals for the Fifth Circuit.

- 1988–2000 Concurrently, with above positions, Adjunct Professor at University of Houston Law Center.
- 1983-1984 Paralegal, Koons Rasor Fuller & McCurley in Dallas, Texas.
- 1982-1983 Manager, Forest River, A CREMCO Resort Property; Gadsden, Alabama. Managed a 248- unit residential river resort on 22 acres including recreational facilities and ~15 employees. Served on the Gadsden Chamber of Commerce.
- 1977-1981 Administrative/Legislative Aide to Texas State Senator Lindon Williams in Austin, Texas. Drafted legislation and interim study committee reports related to the arts, natural resources, and education. Legislative research and public relations including writing and publishing semiannual newsletter for a constituency over 300,000.
- 1979-1982 Teacher, The Lincoln School, S.A.; Guadalajara, Mexico. Taught high school social studies and music classes; directed an English Language school conducted on the campus at night. (Took leave to work in Texas legislature during the 1981 session.)

Affiliations / Accomplishments / Volunteer Service

- ◆ Texas State Bar and Real Estate, Probate & Trust Law Section; Texas Bar College; Sustaining Life Fellow - Texas Bar Foundation; Houston Bar Association and Probate, Trusts & Estate Law Section; Houston Estate & Financial Forum; Houston Business & Estate Planning Council; Attorneys in Tax and Probate; National Association of Estate Planners & Councils (NAEPC).
- ◆ Current Board Service – Immediate Past Chair, Houston Bar Association Probate, Trust & Estate Section Executive Council; Texas Bankers Association Wealth Management and Trust Division, Trust School Advisory Board, and Intergovernmental Relations Committee.
- ◆ Previous Board Service – President, Houston Estate & Financial Forum Board of Directors; Chairman, Texas Bankers Association Wealth Management and Trust Division Executive Board; President, Houston Business & Estate Planning Council; Vice-Chair, University of Houston Law Center Alumni Board; University of St. Thomas Development Advisory Board; Houston Bar Association Probate, Trust & Estate Law Section Executive Council.
- ◆ Fellow – American College of Trust and Estate Counsel (ACTEC).
- ◆ NAEPC Accredited Estate Planner (AEP) since 2007; NAEPC National Speakers Bureau.
- ◆ Adjunct Professor of the Year 1999, University of Houston Law Center.
- ◆ Volunteer Experience includes Horses & Human Research Foundation, Governance Committee; Annunciation Orthodox School; St. Thomas High School; Greater Houston Partnership Texas Scholars Program for Houston Independent School District; Houston Bar Association Lawyers in Public Schools; United Church Athletics League (UCAL); HITS Children’s Theater; University of Houston Law Center Alumni Board, Galas, and Law Student Mentor; Houston Bar Association/Buffalo Bayou Clean-Up Partnership; University of St. Thomas Development Advisory Board.

Presentations

- ◆ Lessons from *King Lear*: How (and How Not) to Transition a Closely Held Business, State Bar of Texas 29th Advanced Estate Planning Strategies Course, 2023 (co-presenters: Mickey Davis, Hobbs Gnaim, and Dan McCarthy).
- ◆ Shakespeare, Succession and Estate Planning, The Estate Forum, Houston, 2022.
- ◆ Diving Deep into Drafting Issues in 21st Century Estate Plans, American College of Trust & Estate Counsel (ACTEC), 2021 (co-presenters Mickey Davis and Phil Hayes; Ron Aucutt, moderator).
- ◆ How to Build a Modern Trust that Delivers What Clients Want, State Bar of Texas 43rd Annual Advanced Estate Planning & Probate Course, 2019 (co-presenter Glenn Karisch).
- ◆ All's Well that Ends Well – Designing a Plan That Performs As You Like It, State Bar of Texas 25th Advanced Estate Planning Strategies Course, 2019 (co-presenters: Lora Davis, Al Golden, and Steven Tryptten).
- ◆ Reading, Interpreting and Drafting Distributions Provisions That: Say What You Mean and Mean What You Say, Tarrant County Probate Bar Association 2022; San Antonio Estate Planning Council 2022; University of Texas at Austin School of Law Stanley M. Johanson Estate Planning Workshop 2021; Dallas Estate Planning Council 2021; Sioux City Estate Planning Council 2020; Texas CPA Society (TXCPA) Advanced Estate Planning Conference 2019; Houston Estate and Financial Forum 2019; National Association of Estate Planners and Councils (NAEPC) Advanced Estate Planning Strategies Course 2018; Texas Bankers Association – Trust Management Conference 2017; Houston Bar Association – Probate Trust & Estate Section 2017; San Antonio Estate Planning Council 2015; Houston Attorneys in Tax and Probate 2015; State Bar of Texas 25th Estate Planning & Probate Drafting Course 2014.
- ◆ The Art and Science of Discretionary Distributions, Arkansas Bankers Association Mega Trust Conference, 2018; Texas Bankers Association Graduate Trust School 2018 – 2022; formerly, Discretionary Distributions: Old Rules, New Perspectives, State Bar of Texas 38th Advanced Estate Planning and Probate Course, 2014; South Texas College of Law Wills & Probate Institute 2013; Arkansas Bankers Association Annual Trust Seminar 2012; Corpus Christi Estate Planning Council 2012; San Antonio Estate Planning Council 2012; Houston Bar Association Trust & Estate Section 2012; El Paso Estate Planning Council 2010; TBA Graduate Trust School 1999 – 2017.
- ◆ Drafting & Administering Silent Trusts, Houston Business & Estate Planning Council (co-presenters Robert Weylandt and Stephanie Donaho) 2013.
- ◆ Personal Trust Administration from a Corporate Trustee Perspective – A Peek Inside, Fort Worth Estate Planning Council 2006; San Antonio Estate Planning Council 2005; Midland Business & Estate Planning Council 2004; Corpus Christi Estate Planning Council 2004; State Bar of Texas 27th Advanced Estate Planning & Probate Course, 2003.
- ◆ Criteria for Selecting a Fiduciary – the Perfect Birdcage, Houston Estate and Financial Forum 2021; The Estate Forum 2018; South Texas College of Law Wills & Probate Institute 2012; Lorman Trust Seminar 2008; Texas Society of CPAs, Advanced Estate Planning Conference 2002.
- ◆ The Uniform Principal and Income and Prudent Investor Acts and the Power to Adjust, Midland Business & Estate Planning Council 2007; San Antonio Estate Planning Council 2007; Houston Estate and Financial Forum

2006; Corpus Christi Estate Planning Council 2005; El Paso Society of CPAs 2005; Houston Bar Association Wills & Probate Advanced Course 2004.

- ◆ Survey of Ownership and Transfer Law, TX Bankers Association Graduate Trust School 2007 - 2022.
- ◆ Personal Trust Administration, Texas Bankers Association Trust School 1999 - 2022.
- ◆ Survey of Legislative Initiatives in Texas Trust and Estate Law, Texas Bankers Association Advanced Trust Forum - Dallas 2008; Rio Grande Valley Estate Planning Council – McAllen 2009.
- ◆ Documentation & Document Retention – Who, What, When, Where and Why Trustees Still Generate So Much Paper (And What to Do With It), Texas Bankers Association 2008.
- ◆ Fiduciary Law, American Bankers Association National Graduate Trust School 2005 - 2006.
- ◆ Getting Documents from Financial Institutions - Where to Find Texas Statutory Requirements and How to Use Them (With Some Helpful Tips and Forms), University of Houston Law Center Advanced Civil Discovery Seminar – Dallas/Houston 2005; South Texas College of Law Annual Wills & Probate Institute 2000.
- ◆ Practicing in Today’s Environment: Effect of HIPAA, the Patriot Act and Privacy Concerns, South Texas College of Law Wills & Probate Institute 2004 (co-presenters Georgia Akers and Carla Thompson).
- ◆ Fiduciary Responsibility - Businesses in Trust, National Trust Closely Held Business Association, 26th Annual Workshop for Managing Closely Held Businesses in Trust 2001.

Print Publications

- ◆ *Property Law for Fiduciaries*, JOURNAL OF THE NAEPC (2008).
- ◆ *Discretionary Distributions: Old Rules, New Perspectives*, 6 ESTATE PLANNING & COMMUNITY PROPERTY LAW JOURNAL, 181-220 (2014).
- ◆ *Texas Lawyer*, Privacy Notices: Who Gets Them and What Should They Say? August 5, 2002; *Texas Lawyer*, Knowing When to Say No: The Pitfalls of Fiduciary Service, September 10, 2001; *Texas Lawyer*, Criminal Lawyers and Cash Transactions - How to Make Sure You’re Complying with the Law, November 2, 1998 (co-author); *Texas Lawyer*, Lessons in Obtaining Financial Documents and Bank Records, August 17, 1998.
- ◆ *Texas Law Reports*; Guidelines for Obtaining Documents from Financial Institutions, August 2002; Regular Columnist for *Texas Law Reports* on Banking and the Law 1995 - 1997 including Why Use a Corporate Fiduciary; Consult an Expert to Lighten the Ad Litem Load; New Guidelines for Obtaining Documents From Financial Institutions; Contents of Bank Signature Cards; Lending to Limited Liability Companies; The Supreme Court, Federal Preemption and Your Junk Mail; Dodging Bullets as a Trustee; Greening Up Brownfields; The Attorney Client Privilege vs. The Duty of Disclosure; and Insurance Considerations for a Trustee, Executor or Advisor Acting for Children.
- ◆ *The Houston Lawyer*, The Greatest Gift - Essay on a Local Educator, March/April 1997.
- ◆ Various private company publications including Sentinel Trust Company’s *On Watch*.