DENISE A. LAMBERT

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TEACHING EXPERIENCE

2008 – 2020

TIAA – *(TIAA is a Fortune 100 financial services organization that is the leading provider of financial services in the academic, research, medical, cultural and government fields).* Created and presented live webinars to external institutional clients on various estate and tax topics (average attendance 350 people); Created and presented live internal "Learn and Earn" webinars (CFP credit) for Wealth Management Advisors within the company on various estate and tax topics (average attendance 375 people). Each of these were one hour sessions that occured once per month, with the presenters rotating within my group. I personally presented 4 or 5 webinars and Learn and Earns per year, and contributed on the Q & A panel for those where I am not the presenter. 2020 Presentations included: Introduction to Trusts; Tax Planning in 2020; Planning for Diminished Capacity or Illness; Planning with Retirement Assets.

1996 – 2002

Boston University Law School Graduate Tax Program, Boston, MA – taught Individual Income Tax and Fiduciary Income Tax, one session per semester.

1994 – 1995

Massachusetts School of Law, Andover, MA – taught Legal Writing to first year law students.

LEGAL EXPERIENCE

2008 – 2020

TIAA – *Director, Wealth Planning Strategies*

Client work: Provided wealth transfer, estate, and tax planning services for the company's high net worth clients with the most complex needs. My estate planning knowledge and background has allowed me to provide these families with specialized advice and sophisticated planning strategies for every aspect of their financial lives.

Thought leadership: Authored and updated articles on popular estate and tax topics for our "white paper" library designed for distribution to client base. Create and deliver "webinars" and "Learn and Earn" educational sessions described above.

Teaming: Worked closely with regional Wealth Management Directors to support their advisor teams. Assisted advisors by participation in client strategy calls to identify and propose solutions for various incapacity and estate planning challenges. Prepared and presented interactive “Lunch and Learn” sessions that allowed an in-depth exploration of various estate and tax topics. Worked one on one with individual advisors who need additional help with estate planning.

1995 – 2008

Private Law Practice, Boston, MA - Private law practice at various firms providing sophisticated estate planning advice, estate administration and tax matters. Drafting of wills and trusts containing complicated tax and dispositive provisions, family limited partnerships, irrevocable life insurance trusts, qualified personal residence trusts, charitable trusts, and other planning devices.

EDUCATION

B.F.A. University of Michigan School of Art, Ann Arbor, MI (1980)

J.D. Suffolk University Law School, Boston, MA (1991)

LL.M. Boston University School of Law (Taxation), Boston, MA (1992)

PROFESSIONAL

Admitted Massachusetts Bar (1991)

Admitted Maryland Bar (2012)

Admitted U.S. Tax Court (1994)

Certified Financial Planner (2008)