

**C.V. of
KAREN E. BOXX**
Professor
University of Washington School of Law
William H. Gates Hall
Box 353020
Seattle, Washington 98195-3020

EXPERIENCE:

- University of Washington School of Law (1997-present)
Current position: Professor
Areas of Teaching and Research: Wills and Trusts, Property, Community Property, Professional Responsibility, Estate Planning and Estate and Gift Tax, Cannabis Law and Conflicts of Laws
- Washington Law School Foundation
Executive Director 2007-2010
- Keller Rohrbach L.L.P., Seattle, Washington
Partner 1991-1997
Of counsel 1997 to present
- Bogle & Gates, Seattle, Washington
Associate 1988-1991
- Preston, Thorgrimson, Ellis & Holman, Seattle, Washington
Associate 1983-1988

EDUCATION:

University of New Mexico, Albuquerque, New Mexico
B.A., with distinction, Linguistics; *cum laude*, 1976
Phi Beta Kappa.

University of Washington, Seattle, Washington
J.D., with high honors, 1983
Order of the Coif
Executive Editor, Operations--Washington Law Review

BAR ADMISSIONS:

Admitted to the Washington State Bar, United States District Court for the Western District of Washington, United States Court of Appeals for the Ninth Circuit, United States Tax Court, United States Supreme Court.

PUBLICATIONS:

Articles

“Tiptoeing Through The Landmines: The Evolution Of States’ Legal Ethics Authority Regarding Representing Cannabis Clients,” 43 Seattle U. L. Rev. 935 (2020).

“Janus as a Client: Ethical Obligations When Your Client Plays Two Roles in One Fiduciary Estate,” co-authored with Philip Jones, 44 ACTEC L. J. 223 (2019).

“The Use of Joint Revocable Trust for Unmarried Couples,” Practical Lawyer, June 2015, at 53.

“Shakespeare in The Classroom: How An Annual Student Production Of King Lear Adds Dimension To Teaching Trusts And Estates,” 58 St. Louis U. L. J. 751 (2014).

“Washington Trust Laws’ Extreme Makeover: Blending With The Uniform Trust Code And Taking Reform Further With Innovations In Notice, Situs, And Representation,” coauthored with Katie S. Groblewski, 88 Wash. L. Rev. 813 (2013).

“Too Many Tiaras: Conflicting Fiduciary Duties In The Family-Owned Business Context,” 49 Houston L. Rev. 233 (2012).

“A Call for Standards: An Overview of the Current Status and Need for Guardian Standards of Conduct and Codes of Ethics,” co-authored with Terry W. Hammond, 2012 Utah L. Rev. 1207 (2012).

“Distinguishing Trustees and Protecting Beneficiaries: A Response to Professor Leslie,” 27 Cardozo L. Rev. 2753 (2006).

“Of Punctilios and Paybacks: The Duty of Loyalty under the Uniform Trust Code,” 67 Missouri L. Rev. 279 (Spring 2002).

“The Durable Power of Attorney’s Place in the Family of Fiduciary Relationships,” 31 Georgia L. Rev. 1 (2001).

“Gray’s Ghost – A Conversation about the Onshore Trust,” 85 Iowa L. Rev. 1195 (2000).

“Community Property across State Lines,” Probate and Property (Jan/Feb. 2005).

Books, Book Chapters and Other Publications

Washington Probate and Estate Administration (2018; 2019; 2020; 2021 LexisNexis).

Tax Management Portfolio, *Community Property: General Considerations*, No. 802-3rd (co-authored with Gerald Treacy) (Bloomberg 2021 ed.)

Co-Reporter, Fifth Edition (2016), Reporter, Sixth Edition (forthcoming) *ACTEC Commentaries on the Model Rules of Professional Conduct*.

Editor and Co-editor, Washington Community Property Deskbook (3d. ed. WSBA 2003); (4th ed. WSBA 2014); (5th ed. WSBA forthcoming).

Siegel's Wills and Trusts: Essay and Multiple Choice Questions and Answers (2013 revision) (2013 Aspen).

Skills and Values: Estates and Trusts (co-authored with Professor Roger Andersen) (2009 LexisNexis).

"Planning for Disability, Health Care and Other End of Life Concerns," chapter 6, Washington State Bar Estate Planning Deskbook (2005) (co-authored with Karen Thompson and Steven Milam).

Recent Amicus Briefs

May v. County of Spokane, Washington Supreme Court Case No. 99598-2 (argued October 21, 2021)(interpretation of statute providing for removal of racially restrictive covenants from property records).

Estate of Petelle 195 Wn.2d 661 (2020)(effect of general waiver in property settlement agreement on intestacy rights of surviving spouse).

LAW REFORM ACTIVITIES:

Reporter, Uniform Crowdfunding Donations Distribution Act (Uniform Law Commission Drafting Committee 2017-2020).

ABA Advisor, ULC Drafting Committee, Uniform Restrictive Covenants in Deeds Act (2021-present).

Chair, Washington Uniform Trust Code Task Force (task force of the Washington State Bar Association Real Property, Probate and Trust section, considering adoption of all or portions of the UTC and revising Washington Trust Code) 2003 – 2011, member, Washington Trust Act revisions committee 2012-2013, and member, National UTC Committee.

-Chaired eight-year Task Force that drafted major revision to Washington's trust statutes, obtained Washington State Bar Association sponsorship of the Task Force proposal and testified in support of the proposal to the Washington Legislature. The Task Force

proposal was enacted into law in 2011, as House Bill 1051. Amendments to the Act were enacted in 2013.

ABA Real Property, Trust and Estates Section Advisor, ULC Drafting Committee, Uniform Divided Trusts Act (2014-2017).

ABA Real Property, Trust and Estates Section Advisor, NCCUSL Drafting Committee, Uniform Guardianship Jurisdiction and Enforcement Act (2005-2008).

-Participated on drafting committee of the Uniform Guardianship Jurisdiction and Enforcement Act, which is modeled on the Uniform Child Custody Jurisdiction Enforcement Act and coordinates jurisdictional issues for multistate guardianships.

Chair, Probate and Trust Legislative Committee, Washington State Bar Association Real Property, Probate and Trust Section (2010-2012); currently member of committee.

-As Chair, responsible for WSBA RPPT section review of all legislative proposals affecting probate and trust issues, section responses and comments to the Washington Legislature on proposed and pending legislation in the area of probate and trust, and oversight of all section legislative proposals in the area of probate and trust.

Chair, Washington Durable Power of Attorney Task Force (task force of the WSBA Real Property, Probate and Trust section, revising the state durable power of attorney statute) 1999-2002.

-Legislation prepared by the Task Force was enacted into law in 2002.

ABA Real Property, Trust and Estate Section delegate, speaker, working group reporter and member of planning committees, Third Guardianship Summit (October 2011), and participant, Fourth Guardianship Summit (May 2021).

-The Third Summit, organized by the National Guardianship Network, resulted in a number of proposals regarding national guardianship reform. The Fourth Summit intends to do the same.

OTHER PROFESSIONAL MEMBERSHIPS AND ACTIVITIES:

- American Bar Association Real Property, Trust and Estate Section:
 - Member, Council
 - Immediate past Co-Chair, Standing Committee on Groups and Substantive Committees (2016 to 2021; committee member 2007 to present).
 - Group Chair, 2015-2017 and 2007-2010, Group Vice Chair, 2004-2007 and 2011-2014, Elder Law, Disability Planning and Bioethics Group.

- Committee Chair, 2003, and Committee Vice-Chair, 2002, E-1 Guardianships and Powers of Attorney Committee.
- RPTE representative, National Conference of Lawyers and Corporate Fiduciaries (2017-2019).
- Chair, Washington State Bar Association Elder Law Section (2018-2020), co-chair, Legislative Committee (2015 – 2018; present) and member, Executive Committee (2015 – present).
- Chair (2013-2014), Probate and Trust Council Director (2010-2012) and member, Executive Committee (2010-2015), Washington State Bar Association Real Property, Probate and Trust Section.
- Member, Washington State Bar Association Rules of Professional Conduct Committee (2009-2012).
 - Participated in subcommittee that proposed amendments to RPC 3.8, which were adopted in part by the Washington Supreme Court on November 3, 2011.
 - Chaired subcommittee on cloud computing (Opinion 2215)
- Member, 2008- present, and Acting Chair, 2009-2010, University of Washington Advisory Committee on Faculty Code and Regulations.
- Fellow, American College of Trust and Estate Counsel, and member of Elder Law, Legal Education, and Professional Responsibility Committees.
- Reporter, Sixth Edition, *ACTEC Commentaries on the Model Rules of Professional Conduct* (in progress).
- Member, Seattle Estate Planning Council, since 1984.
- Contributing author, King County Probate Policy Manual (1995), co-chair and contributing author of 2003 update.

AWARDS:

WASHINGTON LAW REVIEW RICHARD O. KUMMERT OUTSTANDING CONTRIBUTION AWARD 2017

WASHINGTON LAW AND POLITICS SUPERLAWYER® 2003 – 2010; 2012-2021.

FACULTY SERVICE AWARD, PACIFIC COAST BANKING SCHOOL 2009

WASHINGTON LAW REVIEW DISTINGUISHED ALUMNI AWARD 2003

SELECTED RECENT CONFERENCES AND PRESENTATIONS:

- *Washington Update*, Portland Estate Planning Council, 51st Annual Estate Planning Seminar, February 4, 2022 (Portland, OR).
- “Estate Planning in the new Remote Environment,” 17th Annual Jerry A. Kasner Estate Planning Symposium, (Virtual – Santa Clara School of Law School) (Oct. 8, 2021).
- “New Issues and New Cases in Legal Ethics for Estate Planners,” Estate Planning Council of Seattle and University of Washington School of Law, Graduate Program in Taxation, 66th Annual Estate Planning Seminar Oct. 29, 2021 (Seattle, WA).
- “Trust and Estate Planning for Addiction and Other Mental Health Challenges,” ALI-CLE Webinar (April 21, 2021).
- “When there is a Will there is a Way: Estate Planning During COVID – Ethical and Practical Issues,” 16th Annual Jerry A. Kasner Estate Planning Symposium, (Virtual – Santa Clara School of Law School) (Sept. 24, 2020).
- “Where There’s a Will: Ethics of Remote Lawyering,” American College of Trust and Estate Counsel Summer 2020 Meeting, June 2020.
- “Ripped From The Listserv: Joint Representations, Clients Wearing Multiple Hats, & Other Material Limitation Conflicts,” Association of Professional Responsibility Lawyers 2020 Annual Meeting, February 15, 2020 (Austin, TX).
- *Washington Update*, Portland Estate Planning Council, 48th Annual Estate Planning Seminar, January 24, 2020 (Portland, OR).
- “You Be the Judge: Ethical Dilemmas Posed by Current Cases and Ethics Opinions,” 2019 Annual Fall Probate and Trust Seminar, December 11, 2019 (Seattle, WA).
- “You Be the Judge: Ethical Dilemmas Posed by Current Cases and Ethics Opinions,” Estate Planning Council of Seattle and University of Washington School of Law, Graduate Program in Taxation, 64th Annual Estate Planning Seminar, Nov. 19, 2019 (Seattle, WA).
- “Avoiding a Wealth of Trouble: Loss Prevention for Trust and Estate Lawyers,” with co-presenters Linda Retz, Torrance, CA, and Randy Curato, Attorneys’ Liability Assurance Society, ACTEC Webinar, October 27, 2019.
- “You Be the Judge: Ethical Dilemmas Posed by Current Cases and Ethics Opinions,” with co-presenter Linda Retz, Torrance, CA, ACTEC Western Region Annual Meeting, August 31, 2019 (Kona, Hawaii).
- “The Use of Joint Trusts for Married Couples,” ABA Section of Real Property Trust and Estate Law Skills Training for Estate Planners, New York, NY (July 2015; July 2016; July 2017; July 2018); and Columbia, S.C. (July 2019).
- “Estate Litigation after Rathbone,” Panel Discussion with Ann T. Wilson and Karolyn Hicks, WSBA 16th Annual Trust and Estate Litigation Seminar, May 8, 2019 (Seattle, WA).
- “Post-Engagement Letters: When Do You Need To Send Revised Engagement Letters To Existing Clients?” Estate Planning Council of Seattle and University of Washington School of Law, Graduate Program in Taxation, 63rd Annual Estate Planning Seminar, Nov. 13, 2018 (Seattle, WA).
- “Ethical Questions Raised By The Fifth Edition Of The ACTEC Commentaries On The Model Rules Of Professional Conduct,” ACTEC 2018 Rocky Mountain Region Annual Meeting, September 2018 (Coeur d’Alene, ID).

- “The Use of Joint Trusts for Married Couples,” ABA Section of Real Property Trust and Estate Law Skills Training for Estate Planners, New York, NY (July 2015; July 2016; July 2017; July 2018).
- “Modern Trusteeship under the Uniform Directed Trust Act,” ABA Section of Real Property, Trust and Estate Law 2018 Spring Symposia, May 10, 2018 (Orlando, FL).
- The Go-Fund-Me Revolution: How A Uniform Act Could Protect Donors, Fundraisers And Beneficiaries Of Crowdfunding Campaigns,” ACTEC 2018 Annual Meeting, March 11, 2018 (San Antonio, TX).
- *Washington Update*, Portland Estate Planning Council, 46th Annual Estate Planning Seminar, Feb. 9, 2018 (Portland, OR).
- “Federal Law and Regulatory Update,” Medical and Recreational Marijuana in Washington State (Seattle, WA Nov. 30, 2017).
- “Conflicting Fiduciary Duties In The Family-Owned Business Context,” 2017 Southern California Tax & Estate Planning Forum (San Diego, CA Oct. 27, 2017).
- “Ethical Considerations In Community And Separate Property Planning,” 2017 Southern California Tax & Estate Planning Forum (San Diego, CA Oct. 26, 2017).
- “No Good Deed Goes Unpunished: Ethical Concerns for Estate Planning Lawyers’ Service on Charitable Boards and Other Conflicts between an Estate Planning Lawyer’s Clients and the Lawyer’s Personal Charitable Interests,” Estate Planning Council of Seattle and University of Washington School of Law, Graduate Program in Taxation, 62rd Annual Estate Planning Seminar, Nov. 10, 2017 (Seattle, WA).
- “The ACTEC Commentaries on the Rules of Professional Conduct,” Oregon State Bar, Basic Estate Planning and Administration (Portland, OR Nov. 17, 2017).
- “Ethical Issues Involving Community and Separate Property Planning Techniques,” 2017 Western Regional Meeting, ACTEC (Lake Tahoe, NV Sept. 17, 2017).
- “Washington’s New Decanting Statute: Mechanics and Strategies,” WSBA Fall Elder Law Seminar (Seattle, WA Sept. 8, 2017).
- “Multijurisdictional Practice and the Transactional Lawyer,” Washington State Bar Association Real Property, Probate and Trust Section Midyear Meeting (June 9, 2017 Walla Walla, WA).
- “Federal and State Cannabis Update,” 2017 National Assoc. of Unemployment Insurance Appeals Professionals Training Conference (Seattle, WA June 20, 2017).
- Panelist, “Ethics in Estate Planning & Elder Law: The Hard Ones,” 43d National Conference on Professional Responsibility, ABA Center for Professional Responsibility (St. Louis, MO June 1, 2017).
- “Powers of Attorney and Financial Institutions: Oil and Vinegar?,” ABA RPTE Section Spring Symposia (Denver, CO April 20, 2017).
- “The Updated ACTEC Commentaries on the Rules of Professional Conduct (Fifth ed. 2016): Current Ethical Issues for Estate Planners,” ABA RPTE Professors’ Corner Webinar (April 11, 2017).
- *Washington Update*, Portland Estate Planning Council, 45th Annual Estate Planning Seminar, Jan 20, 2017 (Portland, OR).
- “New Washington Durable Power of Attorney Statute,” East King County Estate Planning Council, Bellevue, WA (Nov. 10, 2016).

- “Ethical Challenges in Representing Clients with Diminished Capacity,” American College of Trust and Estate Counsel Fall Meeting 2016, Charleston, S.C. (Oct. 21, 2016).
- “Ethical Questions Raised by the Fifth Edition of the ACTEC Commentaries on the Model Rules of Professional Conduct,” Estate Planning Council of Seattle and University of Washington School of Law, Graduate Program in Taxation, 61st Annual Estate Planning Seminar, Nov. 1, 2016 (Seattle, WA).
- “Current Ethical Issues of Estate Planners: Updated ACTEC Commentaries and Recurring Challenges,” ACTEC/ALI-CLE webinar (Oct. 6, 2016).
- “Proposed Revision to ACTEC Commentaries on Ethics,” 12th Annual Jerry A. Kasner Estate Planning Symposium, Santa Clara, CA (Sept. 30, 2016).
- “New Durable Power of Attorney Act: What you Need to Know and How your Forms Should Change,” Washington State Bar Association Real Property, Probate and Trust Section Midyear Meeting (Suncadia Resort, Cle Elum, WA) (June 19, 2016).
- Moderator, “The ABLE Act, Social Security Benefits Planning, Veterans Benefits and Guardianship Reform: Revolutionary Methods to Anticipate and Manage Disability and Retirement Needs,” ABA RPTE Section Spring Symposia (Boston, MA May 12, 2016).
- “New Edition of ACTEC Commentaries on the Model Rules of Professional Conduct,” 2016 Senior Lawyers Section Conference, Washington State Bar Association (Seattle, WA May 6, 2016).
- “Community Property Basics for Common Law Lawyers and Paralegals,” 2016 eLearning Program, ABA RPTE section (webinar, May 5, 2016).
- “Marijuana Law: Policy Perspectives,” Marijuana Law: Changes in Regulation and Best Practices, Washington State Bar Association (Seattle, WA April 12, 2016).
- “The Best is Yet to Come: Preview of Issues Encountered in the Upcoming New Edition of the ACTEC Commentaries on the Model Rules of Professional Conduct,” American College of Trust and Estate Counsel Annual Meeting 2016, Las Vegas, NV (March 17 and 18, 2016).
- “Case Law Updates,” Navigating Elder Law Systems: Advising Clients in a Complex World, Washington State Bar Association Elder Law Section (Seattle, WA March 4, 2016).
- “Forthcoming Fifth Edition of the ACTEC Commentaries and Annotations: What’s New, What’s Trending in Estate Planning Ethics Issues, and What’s Being Clarified,” with Thomas Andrews, Estate Planning Council of Seattle and University of Washington School of Law, Graduate Program in Taxation, 60th Annual Estate Planning Seminar, Nov. 3, 2015 (Seattle, WA).
- Panelist, “The Ethics of Multidisciplinary Practice – Staying Inside the Ethics Lines When Your Clients Cross Borders,” Estate Planning Council of Seattle and University of Washington School of Law Graduate Program in Taxation, 60th Annual Estate Planning Seminar, Nov. 2, 2015 (Seattle, WA).
- Moderator, Ninth Annual Ethics Teleconference for Estate Planners, ACTEC/ALI-CLE (October 8, 2015).
- “A Primer on MultiJurisdictional Practice,” American College of Trust and Estate Counsel Summer Meeting 2015, Quebec City, Quebec, Canada (June 18, 2015).
- “ACTEC Commentaries On The Model Rules Of Professional Conduct: History, Revisions, And Recent National Case Law And Ethics Opinions Involving Trust, Estate And Guardianship Issues,” 12th Annual Trust and Estate Litigation Seminar, Washington State Bar Association (Seattle April 22, 2015).

- “Real Estate Co-owned by Unmarried Couples: Handling Contemporary Legal Issues,” ALI CLE Telephone Seminar (April 14, 2015).
- “Powers of Attorney in Disability Planning: Silver Bullet or Landmine?” ABA RPTE section Webinar (February 3, 2015).
- *Washington Update*, Portland Estate Planning Council, 43d Annual Estate Planning Seminar, Jan 30, 2015 (Portland, OR).