



**SUSAN B. SHIELDS**  
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## BIOGRAPHY

Susan Shields practices in the areas of tax and family wealth focusing on wealth transfer tax planning for high net worth families and individuals, business planning for closely held family businesses, estate and trust administration, business entity formation, and the formation and administration of tax-exempt organizations. She also previously served as the leader of the firm's Tax and Family Wealth Group.

Susan is a frequent speaker on a variety of estate planning, probate and nonprofit topics at professional and continuing legal education seminars and has served as an adjunct professor of law in estate planning at the University of Oklahoma College of Law. Her writing credits include "Oklahoma's New Family Wealth Preservation Trust Act," published on October 2, 2004, by the *Oklahoma Bar Journal* and "What Do You Need To Know About Oklahoma's New Education Lottery?" published on January 15, 2005, by the *Oklahoma Bar Journal*. She also served as editor and coordinator of the "OBA/CLE 2001 Form Book" and the "OBA/CLE 2005 Form Book" published by the Oklahoma Bar Association.

Susan's experience and expertise have earned her recognition in *The Best Lawyers in America* (litigation and controversy - tax, trust and estates litigation, non-profit/charities law, tax law, trusts and estates) and *Oklahoma Super Lawyers*, where she has consistently been named to its prestigious "Top 25 Female" and "Top 50 Oklahoma Lawyers" lists. She has also been recognized as Outstanding Pro Bono Lawyer by Legal Aid of Western Oklahoma in 1993, received the Oklahoma Bar Association's Earl Sneed Award in 2005 and its Mona Salyer Lambird Spotlight Award in 2011, and was named to the *Journal Record's* list of Leadership in Law honorees in 2011. Susan is also a two-time finalist for the *Journal Record's* Woman of the Year Award (2005 and 2010).

Susan is an elected fellow of the prestigious American College of Trust and Estate Counsel and is currently serving a three-year term as a member of the Oklahoma Bar Association's Board of Governors. She has also taught estate planning and wealth transfer tax as an adjunct professor at the University of Oklahoma College of Law.

In addition to donating her time as a volunteer and member of the Oklahoma Medical Research Foundation's planned giving council, Susan heads the Central Oklahoma Stanford Alumni Club and has served as a member of the board of directors for the Oklahoma Center for Nonprofits and on the board of directors for SpiritBank.

## REPRESENTATIVE EXPERIENCE

- All forms of wealth transfer tax planning and estate planning, including revocable trusts, wills, life insurance planning, dynasty trusts, GRATs, QPRTs, CRTs and IDGTs
- Business succession planning

- Asset protection planning, including family wealth preservation trusts
- Marital planning
- Family limited partnerships and family limited liability companies
- Tax-exempt organizations formation and ongoing advice on governance and transactions
- Will contest litigation and trust
- Probate and other postmortem planning
- Preparation and advice concerning estate and gift tax returns

## ADMISSIONS

- California, 1989
- Oklahoma, 1992
- U.S. District Court for the Western District of Oklahoma
- U.S. Tax Court

## EDUCATION

- J.D., University of California, Los Angeles, 1989
- B.A., with honors, Stanford University, 1986 (National Merit Scholar)

## PROFESSIONAL ORGANIZATIONS AND MEMBERSHIPS

- Oklahoma County Bar Association
- Oklahoma Bar Association (Board of Governors; Former Chair, Estate Planning, Probate and Trust; Former Member, Legal Ethics Committee)
- Oklahoma Bar Foundation (Secretary/Treasurer, Trustee and Fellow)
- Oklahoma City Estate Planning Council
- State Bar of California
- American Bar Foundation (Fellow)
- American College of Trust and Estate Counsel (Fellow)
- University of Oklahoma College of Law (Adjunct Professor of Law)

## CIVIC INVOLVEMENT AND LEADERSHIP

- Oklahoma Medical Research Foundation (Planned Giving Council)
- Central Oklahoma Stanford Alumni Club (President)
- Oklahoma Center for Nonprofits (Former Member, Board of Directors)
- SpiritBank (Former Member, Board of Directors)
- Leadership Oklahoma Class XVII