Inheritance & Inequality

WILLS, TRUSTS, AND ESTATES MEETS GENDER, RACE, AND CLASS

Drexel Law Review
Thomas R. Kline School of Law

Wealth inequality, and all the other forms of inequality that flow from it – social, political, health, educational – has troubled academics, policy makers, economists, and others for some years now. Wealth, and its lack, is tied directly to inheritance, that is, the practices, laws and culture that facilitate, or inhibit, the transmission of wealth in all its forms from one generation to the next. Speakers at this conference will address the many ways that inequality is embedded in inheritance law and practice around the world; they will also discuss ways to make these laws and practices work for all, including for demographics who have traditionally been cut off from successful wealth transmission.

Friday, September 27

8:00 a.m. Light breakfast & Coffee

8:30 **Welcome**

Dean Dan Filler, Deborah Gordon

8:45–10:15 **Panel One: Justifications – or lack thereof – for a System of Inheritance**
Moderator: **Jack Terrill, Esq.,** Hecksher Teillon Terrill & Sager, PC

Johanna Jacques, Durham University, United Kingdom, *Inheritance as Judgment: A Kantian Argument Against Testamentary Gifts*

Shelly Kreiczer-Levy, College of Law and Business, Ramat Gan, Israel, *Because We Cannot Stop for Death: A New Approach to Property Law and Continuity*

Carla Spivack, Albany Law School & **Deborah Gordon**, Drexel University Thomas R. Kline School of Law, *The False Ideology of Donative Freedom*

10:30–12:00 **Panel Two: Probate and Asset Transfer for the Low and Moderate Income Demographic**
Moderator: **Kirsten Keane**, Esq., Glenmede

Felix B. Chang, Ohio State University Moritz College of Law, *Shadow Probate*

Allison A. Tait, Richmond Law School, *Family Money: Economies of Excess and Extraction*

Danaya Wright, University of Florida Levin College of Law, *Norman Dacey's Legacy: How Revocable Trusts Have Transformed Estate Planning and Who is Missing Out*

12:00 Pick up box lunches

12:15–2:15 **Panel Three: The Intersection of Technology, Trusts & Estates, and Vulnerable People**
Moderator: **Barry Furrow,** Drexel University Thomas R. Kline School of Law

Naomi Cahn, University of Virginia School of Law, *Childfluencers, Child Actors, and Blocked Trust Accounts*

Tabrez Y. Ebrahim, Lewis & Clark School of Law, *AI Access to Justice & the Future of Inheritance?*

Chad Osorio, Wageningen University, The Netherlands, *AI Aristocracy*

Reid Kress Weisbord, **Parker Ramsay**, & **Chris Gitelman**, Rutgers Law School, *The Impact of New Financial Transaction Technology on Vulnerable Donor Populations*

2:30– 4:30 **Panel Four: The Uses and Abuses of Trusts**
Moderator: **Scott Small, Esq.**, Fiduciary Trust

Bridget J. Crawford, Pace Law School, *Fiduciary Frontlines: Trustees at the Crossroads of Duty and Values*

	Adam Hofri, Allard School of Law, British Columbia, Canada, *Looking Through Trusts* **Eric Kades**, William & Mary School of Law, *Piercing the Trust Veil* **Nick Piška**, University of Kent School of Law, Canterbury, United Kingdom, *Trusts and Postcolonialism*
4:30–5:30	**Keynote: Chris Rabb**, Genealogist, Family Historian, Educator, Author, and Policy-shaper, speaking on the intersection of race, wealth & social enterprise
5:30–6:30	Cocktail Reception for all Attendees
7:00	Dinner for Panelists

Saturday, September 28

8:30 a.m.	Light breakfast & Coffee
9:00–10:30	**Panel Five: Families I: Parents, Children, and Spouses** Moderator: **Emalee Welsh**, Esq., Morgan, Lewis & Bockius LLP **Afton Cavanaugh**, University of Baltimore School of Law, *Families Behind Bars: Inheritance Rights for the Dependents of the Incarcerated* **Alyssa A. DiRusso**, Cumberland School of Law, *Fetal Personhood and Inheritance by Unborn Children* **Diane J. Kemker**, Pepperdine Caruso School of Law & Loyola Law School (Los Angeles), *Inheritance Inequality and Post-Mortem Enforcement of Child Support Agreements: A Children's Rights and Contracts Clause Argument*
10:45– 12:15	**Panel Six: Families II: Comparing Families** Moderator: **Wendy Greene**, Drexel University Thomas R. Kline School of Law **Sheryl Buske**, Willamette University College of Law, *Same Same: Tanzania's Nyumba Marriages and Inheritance Inequality* **Prakriti Malla**, South Asian University, New Delhi, India, & **Adhiraj Malla**, Advocate, Supreme Court, Nepal, *Gender Equality in Nepal's Inheritance Law: Reforms, Challenges, and the Path Forward* **Amanda Ward**, Queensland University of Technology, Brisbane, Australia, *Disinheriting Abusive Heirs: Could a U.S-informed Response to Elder Financial Abuse be Utilized in Australia?*

12:15-1:15	Box lunches, coffee, and sweets
1:00–3:30	**Panel Seven: Models for Change: Law, Practice, and Taxes** Moderator: **Carla Spivack**, Albany Law School **Aissatou Barry**, Brooklyn Law School, *Good Mourning: Redesigning Estate Planning As a Tool for Generational Wealth* **Miles Malbrough**, Wake Forest University School of Law, *Progressive Probate: How State Law and Local Rules Can Reduce Financial Barriers to Intergenerational Wealth Building* **Emily Stolzenberg**, Villanova Charles Widger School of Law, *Things of Value* **Sarah E. Waldeck**, Loyola University Chicago School of Law, *Jurisdictional Competition for Ordinary Estates* **Phyllis C. Taite**, University of Oklahoma College of Law, *Tax Policy in a Space of Uncertainty: What's Next After the Tax Cuts and Jobs Act*
3:30–4:30	**Commentary**: **Bridget Crawford**, Pace Law School, & **Anthony Infanti**, University of Pittsburgh School of Law

Aissatou Barry

Professor Barry is a civil services attorney dedicated to advocating on behalf of traditionally marginalized communities through social justice initiatives. She is currently an Assistant Professor of Law and the Director of the Housing Justice Clinic at Brooklyn Law School where students are guided in defending tenants in landlord/tenant proceedings, filing source of income discrimination lawsuits, and drafting wills for elderly homeowners. Prior to Brooklyn Law School, Professor Barry represented tenants with the Legal Aid Society Bronx Neighborhood Office. She also served as a Housing Attorney Trainer providing housing-related CLE trainings for Legal Aid staff and continues to provide housing-related trainings in the New York City area.Professor Barry has taught as an Adjunct Professor at the CUNY School of Law and Benjamin N. Cardozo School of Law. In addition to being a Housing Attorney, Professor Barry is an advocate for youth-centered activism and a proponent of initiatives that grow and protect the financial wealth of New Yorkers Born in Guinea and raised in Brooklyn, Aissatou earned her BA from the University of Michigan and her JD from Washington University School of Law.

Sheryl Buske

Sheryl Buske is an Assistant Professor and Director of International Programs at Willamette University School of Law. Buske teaches first-year advocacy classes, upper-level child welfare classes and runs the law school's international programs. Buske's scholarship is concerned with children's rights; she has written on topics such as access to medical care, military enlistment, child labor, child marriage and customary adoptions.

Naomi Cahn

Naomi Cahn is the Anthony M. Kennedy Distinguished Professor of Law and co-director of the Family Law Center at the University of Virginia School of Law. Cahn is a co-author of casebooks in both family law and trusts and estates, and she has written numerous articles in the areas. In addition, she is the author or editor of books written for both academic and trade publishers, including ***Hot Flash: How the Law Ignores Menopause and What We Can Do About It*** (forthcoming 2024 with Professors Bridget Crawford and Emily Gold Waldman) and the recently published *Fair Shake: Women and the Fight for a Just Economy* (2024 with Professors June Carbone and Nancy Levit).

In 2017, Cahn received the Harry Krause Lifetime Achievement in Family Law Award from the University of Illinois College of Law, and in 2024, she was inducted into the Clayton Alumni Hall of Fame. She has worked with the Uniform Law Commission as a reporter for two drafting committees. Cahn is a member of the American Law Institute, an elected fellow of the American College of Trust and Estate Counsel, and the former editor of the *ACTEC Law Journal*. She currently serves as an officer of the AALS Trusts and Estates section and is on the steering committee of other sections.

From 2002-04, Cahn researched gender-based violence while on leave and living in Kinshasa, Democratic Republic of the Congo. Cahn has also taught at GW Law and in the Georgetown Law School clinical program and practiced with Hogan Lovells in Washington, D.C., and with Community Legal Services in Philadelphia.

B. Afton Cavanaugh

B. Afton Cavanaugh is an expert in Property Law, Business Law, Trusts and Estates, Estate Planning, Legal Research, and Legal Writing and Rhetoric. He joined the University of Baltimore School of Law faculty in 2024, bringing with him over seven years of experience as a Service Professor of Law and Assistant Dean at St. Mary's University School of Law. At St. Mary's, Professor Cavanaugh taught courses in Legal Communications, Analysis, and Professionalism, Experiential Legal Analysis, Estate Planning and Bar Preparation. He was instrumental in developing and implementing innovative curricula for both online and in-person J.D. programs.

Before transitioning to academia, Afton practiced law as the co-founder and managing member of Cavanaugh Quintanilla, PLLC in Austin, Texas, where he specialized in real estate, business law, and wills and estates. He also gained valuable experience as an associate attorney tasked with resolving title issues for real property.

Afton is an active member of the Texas Bar and several professional organizations, including the Association of Academic Support Educators (AASE), the Association of Legal Writing Directors, and the Legal Writing Institute, where he serves as webmaster. He has presented at numerous conferences on topics like legal education innovation, diversity in law schools, and technology in legal writing instruction. His research focuses on the impact of property and probate schemes on underrepresented populations.

Felix B. Chang

Felix B. Chang is the Robert J. Watkins/Procter & Gamble Professor of Law at Ohio State University Moritz College of Law. He teaches and writes on antitrust, financial regulation, and trusts & estates. His research focuses on the ability of infrastructures to suppress competition in the financial markets as well as the relationship between inheritance law and wealth inequality. Prior to joining Ohio State, Professor Chang was the Associate Dean for Faculty and Research at the University of Cincinnati College of Law, where he also served as Co-Director of the Corporate Law Center. In addition, he has been a visiting professor or visiting scholar at Hong Kong University, National Taiwan University, Singapore Management University, and the University of Graz.

Bridget J. Crawford

Bridget J. Crawford is a University Distinguished Professor at the Elisabeth Haub School of Law at Pace University. She is an Academic Fellow of the American College of Trust and Estate Counsel, a member of the American Law Institute, the former Chair of the AALS Section on Trusts & Estates, the founder of the Law and Society Association's Trusts and Estates International Research Collaborative, and the co-author of three casebooks, *The Law of Succession: Wills, Trusts, and Estates* (Foundation Press, 2d ed. 2021) (with Danaya C. Wright & Michael J. Higdon), *Federal Income Taxes: Cases, Problems & Materials* (West Academic Publishing, 7th ed. 2019) (with Joel S. Newman & Dorothy A. Brown), *Federal Taxes on Gratuitous Transfers: Law and Planning* (Aspen Publishers, 2011; 2d ed. 2023) (with Joseph M. Dodge, Wendy C. Gerzog, Jennifer Bird-Pollan & Victoria J. Haneman).

Prior to joining the Haub Law faculty in 2003, Professor Crawford was a practicing attorney at Milbank LLP, where she specialized in wealth transfer taxation and estate planning. Professor Crawford is a graduate of Yale College (B.A.), the University of Pennsylvania School of Law (J.D.), and Griffith University (Ph.D.) in Brisbane, Australia. At Pace, she teaches courses in Taxation; Trusts & Estates; and Feminist Legal Theory. Professor Crawford's interdisciplinary scholarship explores how seemingly neutral legal rules and systems can reflect, exacerbate, and sustain inequality.

Professor Crawford presently serves as the co-convener of the U.S. Feminist Judgments project and the Law and Society's International Research Collaborative on Feminist Judgments, a global group of over one thousand law professors who reimagine and rewrite key judicial decisions from feminist perspectives. You can follow Professor Crawford on X @ProfBCrawford, on Threads @bridget_j_crawford, or on LinkedIn. She welcomes connections and inquiries from students, alumni, practitioners, and colleagues with shared interests.

Alyssa A. DiRusso

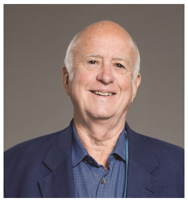
Alyssa DiRusso is the Palmer Professor of Law at the Cumberland School of Law at Samford University in Birmingham, Alabama, where she has taught since 2005. Prior to academia, she was an Associate in the Trusts & Estates department of a large Boston law firm and then served as in-house counsel to Bank of America advising its Private Clients and Not-for-Profit business lines. She is the co-author of such beloved beach reads as *Federal Taxation of Wealth Transfers: Cases and Problems* (with Stephanie Willbanks) and *Wills, Trusts and Estates in Focus* (with Naomi Cahn and Susan Gary). She is an elected member of the American Law Institute and an Academic Fellow of ACTEC. Professor DiRusso is grateful to her hosts at the Drexel Law Review and delighted to be spending time with her academic colleagues talking about matters of life and death – mostly death.

Tabrez Ebrahim

Tabrez Ebrahim is an Associate Professor of Law at Lewis & Clark Law School. He is a faculty member of the Lewis & Clark Center for Business Law and Innovation (CBLI), a Faculty Affiliate with the Lewis & Clark College interdisciplinary Data Science Program, and a Research Affiliate with the Bates Center for Entrepreneurship & Leadership. He is a Research Affiliate at the Portland State University Fariborz Maseeh Department of Mathematics + Statistics, a Research Affiliate at the Portland Institute for Computational Science (PICS), and a Visiting Professor (adjunct) at Jordan University of Science & Technology (in Irbid, Jordan).

Professor Ebrahim's scholarship focuses on patent law, law and technology, computational legal analysis and empirical legal studies, business law, and property law. He is a Scholar at George Mason University's Center for Intellectual Property x Innovation Policy (C-IP2), and he has been a Visiting Scholar at the University of Texas at Austin McCombs School of Business and School of Law. He is a registered U.S. patent attorney and an inventor on a U.S. patent.

He graduated with a J.D. degree from Northwestern University Pritzker School of Law, a M.B.A. degree from Northwestern University Kellogg School of Management, a LL.M. degree from University of Houston Law Center, a M.S. degree in mechanical engineering from Stanford University, and a B.S. degree in mechanical engineering (with High Honors) from the University of Texas at Austin.



Barry Furrow

Professor Furrow is a Professor of Law and Director of the Health Law Program at the Thomas R. Kline School of Law at Drexel University. Professor Furrow earned his J.D. at Harvard Law School before clerking with the Superior Court of Massachusetts and then handling civil litigation and health-law cases with the Boston firm, Palmer & Dodge. Professor Furrow is a pioneer in the field of health law, the lead author of eight editions of *Health Law–Cases, Materials and Problem*s. Professor Furrow came to the law school from Widener University School of Law, where he founded the Health Law Institute and earned the Jay Healey Distinguished Health Law Teaching Award from the American Society of Law, Medicine and Ethics. He has also held full-time faculty posts at the University of Detroit School of Law, American University's Washington College of Law and at the George Mason University Anthony Scalia School of Law. His teaching experience also includes teaching stints in the University of Michigan Law School and School of Public Health and the University of North Carolina School of Law in Chapel Hill.

Professor Furrow's expertise spans a wide array of health-related topics, including among others patient safety, mental health, telehealth, and private equity financing in health care. He has written extensively in such publications as the ***University of Pennsylvania Law Review, Duke Law Journal, Harvard Civil Rights – Civil Liberties Law Review*** and *Drexel Law Review*;; and has also published chapters in several Oxford and Cambridge Press Handbooks on Health.

Christopher Gitelman

A third-year law student, Christopher Gitelman is an Executive Editor for the *Rutgers Law Review* and a former member of the executive board for the Society for Corporate Law and Governance. Formerly, he worked as a paralegal at Connell Foley, a researcher for the Eastern District of Pennsylvania's District Court, and as a summer intern at Sills Cummis and Gross with the Labor and Employment, Tax, Real Estate, and Litigation groups. He is currently exploring appellate litigation at Blume Forte Fried Zerres & Molinari.

Deborah Gordon

Deborah Gordon is a Professor of Law and Associate Dean for Academic Affairs at the Drexel University Thomas R. Kline School of Law, where she teaches Trusts & Estates, Legal Methods, and Law & Literature. Professor Gordon's scholarship uses narrative and rhetorical theory, literature, law and emotions jurisprudence, and feminist theory to explore intergenerational donative transfers and fiduciary duties. She has published law review articles in journals like the *Wisconsin Law Review*, *William & Mary Law Review*, and *Yale Journal for Law & the Humanities*, co-authored *Experiencing Trusts & Estates* (West Academic), and co-edited *Feminist Judgments: Rewritten Trusts and Estates Opinions* (Cambridge 2020). Professor Gordon has served on the executive board and as chair of the AALS Trusts & Estates section and is a member of the American Law Institute. Professor Gordon has twice received the Drexel Kline Law's "excellence in the classroom" award.

Wendy Greene

Professor Doris "Wendy" Greene is a trailblazing U.S. anti-discrimination law scholar, teacher, and advocate who has devoted her professional life's work to advancing racial, color, and gender equity in workplaces and beyond. Professor Greene is the first tenured African American woman law professor at Drexel University Thomas R. Kline School of Law and the Director of the law school's Center for Law, Policy, and Social Action. Professor Greene has earned national and institutional awards for her impactful civil rights scholarship and advocacy. The architect of two new legal constructs recognized within anti-discrimination law theory and praxis, "misperception discrimination" and "grooming codes discrimination," Professor Greene's publications in these areas have shaped the enforcement stance of the Equal Employment Opportunity Commission (EEOC), administrative law judges, federal courts, and civil rights organizations in civil rights cases. In 2022, Professor Greene was honored by the Association of American Law Schools as an inaugural recipient of the Deborah L. Rhode Award, which "recognizes someone who has great potential to make a mark during their careers as evidenced by their work that brings a novel perspective or call to action in legal education or the legal profession." Since joining the Drexel Kline Law faculty in 2019, she has also twice earned the law school's DIVEIn Champion of Diversity Award." Professor Greene serves as a Co-Chair of the African American Affairs Committee for the American Bar Association Civil Rights and Social Justice (CRSJ) and as the CRSJ Section Liaison for the ABA Commission on Racial and Ethnic Diversity in the Legal Profession. Additionally, she is the Secretary of the AALS Section on Constitutional Law and a member of: the Editorial Board of the Race and Law Prof Blog; the Executive Board of the AALS Section on Employment Discrimination; the Executive Board of the AALS Section Labor Relations and Employment Law; the Editorial Board of the *Employee Rights and Employment Law Policy Journal* housed at Chicago-Kent College of Law; and the Lutie Lytle Black Women Law Faculty Writing Workshop Program Planning Committee.

Adam Hofri

Adam Hofri's research and teaching have long focused on trusts, including comparative doctrinal treatments of trust law topics, empirical studies of the ways trusts are used in practice by different sorts of clients, studies of many jurisdictions' recent dramatic reforms to their law of trusts, looking to make that law alternately client- and practitioner-friendly, historical and socio-legal accounts of the development of trust law and practice in England and Palestine/Israel, and theoretical accounts of the social and economic functions trusts fulfil, including as a tool for subverting other parts of the law.

Adam's research has been quoted and relied on by social justice organizations such as the Tax Justice Network and the International Consortium of Investigative Journalists. It has also been quoted and relied on in the global media, including the *Washington Post*, the *Miami Herald*, the *Irish Times*, and *El Pais*. Adam's teaching has focused on trusts, corporations and comparative law; he has also been a patient scholar of tax, with an emphasis on trusts taxation. A winner of several grants including a SSHRC grant, Adam has delivered talks at the EU Parliament, the Danish Parliament, and to senior administrators of Scandinavian tax authorities.

Adam has taught, as visiting Professor, at the law schools of the University of Virginia, Georgetown University, the University of British Columbia, Western Ontario University, and the Center for Transnational Legal Studies, London. He has also served as Martin Flynn Global Law Professor at the University of Connecticut School of Law. Adam is a member of the Society of Trusts & Estates Practitioners (STEP) and of the Estate Planning Council of Vancouver. He has long cultivated both an internal (doctrinal and practical) and an external (critical) perspective on the law and practice of trusts.

Anthony C. Infanti

Anthony C. Infanti is the Christopher C. Walthour, Sr. Professor of Law at the University of Pittsburgh School of Law. He teaches a variety of courses in the tax area, including Federal Income Tax, Corporate Tax, and International Tax. His scholarly work focuses on comparative tax law and critical tax theory. His most recent work includes *Tax and Time: On the Use and Misuse of Legal Imagination* (NYU Press 2022) and *Our Selfish Tax Laws: Toward Tax Reform That Mirrors Our Better Selves* (The MIT Press 2018). He is currently working on a book titled *The Human Toll: Taxation and Slavery in Colonial America* that is slated to be published by NYU Press in spring 2025.

Johanna Jacques

Johanna Jacques is an Associate Professor at Durham Law School, UK, where she convenes Trusts Law. She is a graduate of SOAS (BA), Birkbeck (LLB) and the London School of Economics and Political Science (MSc, PhD). Johanna conducts research in property theory, with a particular focus on the trust. Her thinking is shaped by European philosophies of law and justice, and she is a founding member of the Durham Centre for Law & Philosophy, which hosts international scholars in legal philosophy at Durham Law School. Her work has been published in the *Modern Law Review, Law and Critique* and *the Law Quarterly Review*.

Eric Kades

Professor Kades graduated from the Yale Law School, where he was an Articles Editor on the *Yale Law Journal*. He clerked for Judge Morton I. Greenberg on the Third Circuit, and began his teaching career at Wayne State University in Detroit. Author of articles in North Carolina, University of Pennsylvania, Rutgers, and Yale law reviews/journals, and in the *Law and History Review and Law & Social Inquiry* Recipient of teaching awards in 1995, 1996, 1997, 2004, 2018, 2020 and 2024.

Kirsten Keane

Kirsten Keane is a Wealth Administrator for The Glenmede Trust Company, N.A. in their Philadelphia office. In this role, she is responsible for providing thoughtful wealth management advice, trust and account administration, and solutions for fiduciary, charitable, financial and wealth transfer planning. Mrs. Keane works in partnership with investment, tax and wealth planning colleagues to understand client objectives, provide tailored guidance, and ensure wealth management goals are fulfilled.

Previously, Mrs. Keane served as a law intern for Eckert Seamans Cherin & Mellot, where she was responsible for complex legal research and annual professional liability reporting. She also provided pro bono services in her community offering estate planning and tax-filing assistance. Prior to her career in wealth management, Mrs. Keane worked as a manager at a corporate relocation firm.

Mrs. Keane received a Juris Doctorate degree, magna cum laude, from the Thomas R. Kline School of Law at Drexel University and a Bachelor of Arts degree in advertising and public relations, summa cum laude, from the Pennsylvania State University. Mrs. Keane holds the CERTIFIED FINANCIAL PLANNER™ designation.

Diane (Klein) Kemker

Diane (Klein) Kemker, JD, LLM, currently serves as an adjunct professor at two Southern California law schools, Pepperdine Caruso School of Law in Malibu, California, and at Loyola Law School, Los Angeles, California. She graduated from the UCLA School of Law and earned her LLM in taxation summa cum laude from the University of San Francisco School of Law in 2015. In her twenty-five years of law teaching, she has taught the law of wills and trusts as a visitor, adjunct, or full-time faculty member at ABA-accredited law schools in California, Texas, New York, Florida, and Illinois. Her approach to wills and trusts scholarship is critical and intersectional. Her scholarship in the wills and trusts area has appeared or is forthcoming in the *ACTEC Law Journal, American University Law Review, Journal of Legal Education, Lewis & Clark Law Review, University of Pittsburgh Law Review, Baylor Law Review, Idaho Law Review, West Virginia Law Review, Whittier Law Review, Journal of the Legal Profession*, and *Maryland Law Journal of Race, Religion, Gender & Class.*

Shelly Kreiczer-Levy

Shelly Kreiczer-Levy is a Professor of Law and the Vice Dean of the Law School at the College of Law and Business, in Ramat Gan, Israel. Prof. Kreiczer-Levy served as the Chairperson of the Israeli Association of Private Law. She has taught at Cornell Law School, and served as a Visiting Researcher at Yale Law School, and a Visiting Scholar at both Harvard Law School and Emory Law School, and a Visiting Scientist at Pauda University Law School. Her research interests are located at the intersection of property law and intimacy as well as property, consumer protection and technology. She is the author of She is the author of *Destabilized Property: Property Law in the Sharing Economy,* published in 2019 by Cambridge University Press. Among her main publications are *The Data Crowd as a Legal Stakeholder,* Oxford Journal of Legal Studies (2024)*; The Family of the City; The Family of the Country, 71 American Journal of Comparative Law 328* (2023) (w/Baoshi Wang)*; Big Data and the Modern Family,* 2019 Wisconsin Law Review 349; and *Share, Own, Access,* 36 Yale Law and Policy Review 155 (2017).

Miles Malbrough

Miles Malbrough is the Law Fellow for Wake Forest University School of Law's Heirs Property Project, which is housed in the Environmental Law & Policy Clinic. Miles is a graduate of Harvard College and Vanderbilt Law School. He is also a Returned Peace Corps Volunteer, having served in the Dominican Republic from 2016 to 2019. Prior to joining the teaching staff at Wake Forest, Miles was an Equal Justice Works Fellow at Legal Aid Society of Middle Tennessee and the Cumberlands, where he practiced in estate planning, probate, foreclosure, and real property litigation to help clients avoid or overcome heirs property-related legal problems.

Adhiraj Malla

Adhiraj Malla is a Law Practitioner from Nepal, currently serving as a litigation assistant at Rolpa Parichit Law Firm. He holds his advocate license from the Nepal Bar Council and specializes in civil and family law matters. With a strong commitment to justice and equality, Adhiraj aspires to leverage his legal expertise to make a meaningful impact in the field of law.

Mr. Malla earned his Bachelor of Arts Bachelor of Laws (B.A.LL.B.) degree from Tribhuvan University, Nepal, where he was honored with the Academic Excellence Award. He has also completed an internship with the Nepal Law Commission and is a former fellow of the Millennium Campus Network under the United Nations Academic Impact.

Mr. Malla was recently honored by the Chief Justice of Nepal, Bishowambhar Prasad Shrestha, in August 2024, for his outstanding achievement of ranking among the top 10 candidates in the 31st National Advocate License Examination. He is now an incoming Master of Laws (LL.M.) student for the Class of 2025 at Texas A&M University School of Law, where he aims to further enhance his legal expertise and his ability to advocate for justice and equality on a global scale.

Prakriti Malla

Prakriti Malla is a doctoral candidate at South Asian University, New Delhi, India (2021-2026), and an adjunct faculty member at Nepal Law Campus, Tribhuvan University, since 2023. Her PhD research focuses on the engagement of South Asian States with the Hague Conference on Private International Law (HCCH), particularly in the codification of HCCH treaties and its institutional framework. Ms. Malla's research intersects with the fields of Private International Law, Public International Law, and Family Law.

Ms. Malla interned with the Permanent Bureau of the Hague Conference on Private International Law in The Hague (August-December 2022). As a registered advocate with the Nepal Bar Council since 2019, she has also gained experience in practicing Nepalese Family Law across various tiers of the judiciary for some time.

She also served as a Research Assistant to Govinda Bandi, former Law Minister and Senior Advocate, contributing to Post-Universal Periodic Review strategies for Nepal. As an author, Prakriti Malla has published in both national and international journals, including an article in *Brill* titled *Recognition and Enforcement of Foreign Divorce Judgments in India and Nepal: A Comparative Analysis*. She has also presented at several conferences, most recently at the 65th Annual Convention of the International Studies Association held in April 2024 in San Francisco, USA.

Ms. Malla holds a Master's in International Law from South Asian University, India and a BA.LLB from Tribhuvan University, Nepal. She has been awarded prestigious scholarships, including the Silver Jubilee Scholarship, the President Scholarship, and the Dr. Shakuntala Uprety Scholarship, in recognition of her academic excellence. She secured 4th rank in the 2019 National Advocate License Examination conducted by Nepal Bar Council.

Nick Piška

Nick Piška is a Senior Lecturer in Law at the University of Kent (UK). His work focuses on the theory, history and politics of equity and trusts law, succession and estate planning, and critical theories of private law and legal history. In 2012 Nick co-founded the Equity & Trusts Research Network which aims to bring scholars together who challenge the established and dominant modes of thought and analysis in equity and trusts and instead encourage scholarship which emphasizes the political, economic, cultural and ethical aspects of equity. The Network has hosted a number of workshops since its inception, resulting in two special issues of the journal *Pólemos* (guest edited by Nick) on equity and the resources of critique, and a collection of essays entitled *Critical Trusts Law: Reading Roger Cotterrell* (co-edited with Hayley Gibson) published in September 2024.

Chris Rabb

Chris Rabb is an accomplished family historian, genealogist, former professor of practice and author of the book, *Invisible Capital: How Unseen Forces Shape Entrepreneurial Opportunity* (Berrett-Koehler Publishers, 2010).

As a former staffer in the U.S. Senate and the White House Conference on Small Business, he has delved into public policy with a focus on entrepreneurship policy for over three decades. As a former director of a nationally recognized urban business incubator, Mr. Rabb has also seen the programmatic side of entrepreneurial industrial complex. And as a recovering entrepreneur from an extended family of entrepreneurs, he has experienced first-hand the rigors of this vital, but challenging sector of society.

Mr. Rabb's thought leadership is at the intersection of identity, civic innovation and social impact. Mr. Rabb previously held positions at Drexel University, Princeton University and Temple University where he taught social entrepreneurship and organizational innovation. He has also served on the boards of the Bread and Roses Community Fund, Friends of the Wissahickon, The Baltimore Afro-American Newspaper Company (founded by his great-great grandfather in 1892), and Mt. Auburn Cemetery where the aforementioned ancestor was buried.

A native of Chicago, Mr. Rabb adopted Philadelphia as his home in 2002 and lives in the Mount Airy section of the city.

Rabb's keynote address will explore how the interplay of race, business formation and the law relate to the broader issue of ever-widening wealth inequality in the U.S.

Parker Ramsay

A third-year law student, Parker Ramsay is a student attorney at Rutgers Mediation Clinic and has previously served as the Treasurer of the Student Bar Association and Co-Chair of the Student-Faculty Committee. He has worked his entire law school career, formerly as a legal assistant for a real estate law solo practitioner and now as a paralegal at the New Jersey Attorney General's Office in the Division of Consumer Affairs. Ramsay spent his 2L summer working as a judicial intern for Hon. Jodi Lee Alper, P.J.Ch. and will be clerking for Hon. Christopher R. Kazlau, J.S.C. upon graduation.

Scott S. Small

Mr. Small is Trust Counsel for Fiduciary Trust in Pennsylvania. In this role, Scott provides in-house advice and counsel to the clients of Fiduciary Trust in its Radnor office. Scott supports client retention, estate planning and business development efforts within the region, as well as supplying subject matter expertise for all fiduciary activities across the market. Scott is a member of the Fiduciary Trust Regional Trust Administrative and Real Estate Committees, as well as the Regional Management Oversight Group.

Prior to joining Fiduciary Trust, Mr. Small worked at two national banks for a combined 25+ years where he held numerous positions, including the Regional Fiduciary Manager posts for Trust Services and Estate Services, along with National Managing Director posts for Estate Settlement and Administration, Life Insurance Trust Administration, Special Needs Trust Administration, Estate Tax and Generation-Skipping Transfer Tax business segments. Over his career, Scott has chaired two Regional Trust Administrative Committees and was a member of both National and Regional Charitable Trust Administrative Committees.

Mr. Small practiced law in Florida and Pennsylvania for almost 10 years with two prominent national law firms before leaving private practice. Scott is a cum laude graduate of the University of Florida School of Law and a cum laude graduate of the University of Michigan. Scott is a past president of the Philadelphia Estate Planning Council, the largest regional estate planning council in the nation, and he also is a past chair of the Real Property, Probate and Trust Law Section of the

Philadelphia Bar Association, the oldest professional association of lawyers in the nation.

Mr. Small's provision of pro bono estate administration services to families who lost loved ones on 9/11 was featured in an article published in the September 2004 issue of *Kiplinger's Personal Finance*, recently reprinted in the Spring 2024 issue of *The Philadelphia Lawyer*. Scott is a frequent author and lecturer for the Pennsylvania Bar Institute and the Philadelphia Bar Association, he lectured at the 2010 Hawaii Tax Institute and 2013 University of Southern California Gould School of Law Tax Institute, and his chapter on "Choosing Fiduciaries" has been published in every edition of Estate Planning in Pennsylvania (PBI Press 5th ed. 2018).

Emily Stolzenberg

Emily Stolzenberg is an associate professor of law and Villanova Law's inaugural Reuschlein Emerging Scholar. Her research focuses on conflicts between obligation and autonomy in the fields of family law and property. Stolzenberg's work has appeared in the *Boston College Law Review, Brigham Young University Law Review, Maryland Law Review, and North Carolina Law Review*. For her paper *Nonconsensual Family Obligations*, 48 BYU L. Rev. 625 (2022) [SSRN], Stolzenberg received the 2023 Haub Law Emerging Scholar Award in Women, Gender and Law. Stolzenberg earned her J.D. from Yale Law School and a master's in political theory from the University of Oxford. She served as a law clerk to the Honorable Robert D. Sack of the U.S. Court of Appeals for the Second Circuit and practiced family law at Feldesman Tucker Leifer Fidell LLP in Washington, DC. Before coming to Villanova, Stolzenberg was an associate in law at Columbia Law School and a visiting assistant professor of law at the Maurice A. Deane School of Law at Hofstra University. She is a member of the New York and Washington, DC bars.

Carla Spivack

A proud graduate of Amherst Regional High School, Professor Spivack received her BA from Princeton University, her JD from New York University School of Law, and her PhD from Boston College. Between earning her BA and going to law school, she spent several years as a community organizer in the Boston area. Before joining the Albany Law faculty, she taught at Oklahoma City University School of Law since 2005, with wonderful colleagues and students. She is thrilled to back in the part of the country that feels like home.

Professor Spivack teaches and writes in the areas of Wills, Trusts and Estates, Tax law, and Property law. She has published articles in many top law reviews, as well as a book about women and money, co-authored a Wills and Trusts casebook, the Wills and Trusts volume of the Developing Professional Skills series, and the Wills and Trusts Gilberts outlines.

Professor Spivack teaches Wills, Trusts and Estates, Estate Planning and Elder Law. She is passionate about inheritance law and the ways it shapes society and determines its vectors of power and influence along lines of race, class, and gender. In 2016, she started a regular conference about this topic called Wills, Trusts and Estates Meets Gender, Race and Class.

Professor Spivack's other obsessions include nineteenth century novels, animals, and cooking. She's never met a stray dog she didn't try to take home.

Allison Tait

Allison Tait is professor of law and associate dean for faculty development at the University of Richmond where she teaches trusts and estates, family law, estate planning, law and inequality, the meaning of money, and feminist legal theory. Professor Tait joined the University of Richmond Law faculty in 2015. Before coming to Richmond, she was an Associate-in-Law at Columbia Law School. She also clerked for the Hon. Richard Palmer of the Connecticut Supreme Court and spent a year as the Gender Equity Postdoctoral Fellow for the Yale Women Faculty Forum.

Professor Tait's research addresses the regulation of family and household economies and the ways in which this regulation produces complex forms of inequality. Her research takes up questions of entitlement and dispossession and she writes about the ways that family wealth rules help to embed difference along the axes of gender, race, and class. She has written articles about the legal framework of high-wealth exceptionalism; the use of family trusts to safeguard social and cultural capital; and the role of marriage in the creation of economic privilege. She is currently working on a project that compares the legal frameworks of wealth management and poverty governance in order to explicate how the regulation of these polar economies both produces and replicates historical patterns of extraction.

Phyllis Taite

Phyllis Taite is the Associate Dean for Academic Affairs and a tenured Professor of Law at the University of Oklahoma (OU) College of Law. She is a nationally known tax scholar who publishes on leading issues in tax policy and social justice. Her articles are published in law reviews across the nation. She is also a contributor to *Tax Notes*, a leading provider of tax news and analysis for the global community, *Jotwell*, and *Tax Stringer*.

Professor Taite has served as a speaker, panelist, and commentator at numerous national conferences. Most recently, she has served as an invited speaker to Georgetown Tax Law and Public Finance Workshop, Greater Milwaukee Foundation, Beverly Hills Bar Association, American Tax Policy Institute, Seattle Bar Association Annual Estate Planning Seminar, University of Pittsburg Tax Review, Emory University Public Interest Committee, Internal Revenue Service Counsel Speaker Series, Brookings Institute Tax Policy Center, American College of Trust and Estate Counsel Annual Meeting, and the Thurgood Marshall Institute Lab.

Professor Taite has memberships in numerous professional organizations including the American College of Trust and Estate Counsel (ACTEC), The Florida Bar, and the American Bar Association. As an academic fellow, she serves on the Estate & Gift Tax, Tax Policy, Legal Education, and New Members Committees for ACTEC. She is admitted to practice in the U.S. Court of Appeals for the Armed Forces and the State Bar of Florida.

Prior to academia, Professor Taite served as a commissioned officer and attorney in the United States Army Judge Advocate General's Corps (JAG). As a JAG officer, she provided estate planning needs and tax assistance to soldiers and officers serving throughout the country and overseas.

John A. (Jack) Terrill, II

Mr. Terrill is a shareholder in the firm of Heckscher, Teillon, Terrill Sager, P.C., in West Conshohocken. He concentrates his practice in the areas of charitable giving, estate administration, estate planning, tax aspects of charitable organizations, estate and gift taxation, asset protection planning and trust accounting and administration. Mr. Terrill is a member of the Real Property, Probate and Trust Law Section and Taxation Section of the American Bar Association, the Real Property, Probate and Trust Law Section of the Pennsylvania Bar Association, and the Philadelphia Bar Association, for which he chaired the Probate and Trust Law Section in 1995. He is a member of the Philadelphia Estate Planning Council. Mr. Terrill is a fellow and past president of the American College of Trust and Estate Council ("ACTEC"). He is admitted to practice before the U.S. Tax Court, the U.S. Claims Court, the U.S. District Court for the Eastern District of Pennsylvania and the Supreme Court of Pennsylvania. Mr. Terrill earned his A.B., magna cum laude, from Dartmouth College and his J.D., cum laude, from the University of Pennsylvania Law School, where he was an associate editor of the Law Review. He is a frequent speaker around the country on various aspects of asset protection planning, the Financial Action Task Force and a number of other topics.

Sarah Waldeck

Sarah Waldeck has been a Distinguished Professor of Law at Loyola University Chicago School of Law since 2019. She currently serves as Loyola's Associate Dean for Mission Innovation and previously served as the Acting Associate Dean for Academic Affairs. Prior to joining Loyola's faculty, Professor Waldeck was on the faculty at Seton Hall Law School for more than 15 years. Her primary teaching areas are Property and Trusts and Estates. She reviews Trusts and Estates scholarship for *Jotwell* and was a contributor to the legal blog *Concurring Opinions* for almost 10 years. Professor Waldeck's scholarship typically focuses on the intersection of law and social norms and most recently she has used this lens to explore issues surrounding neighborhood desegregation and housing equity.

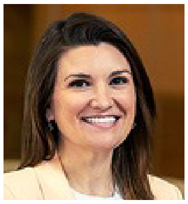
Amanda Ward

Amanda Ward is a PhD candidate at Queensland University of Technology School of Law where she focuses on the intersection of inheritance law and elder financial abuse. Supported by an Australian Government Research Training Program Scholarship, Amanda's dissertation titled *Evolving the Forfeiture Rule to Address the Financial Abuse of Older Australians* uses a unique human rights and expressive theory hybrid lens to critically examine the U.S expanded slayer rule experience and investigate whether Australian jurisdictions could (and should) develop an analogous rule to deter and safeguard against elder financial abuse. Her research provides a fresh perspective on tackling a pervasive social and public health issue through changes in inheritance law and adopting innovative approaches to elder law reform.

Amanda earned her Bachelor of Journalism and Bachelor of Laws (Honours) from Queensland University of Technology and a Graduate Diploma of Legal Practice from the College of Law. She has been admitted in the Supreme Court of Queensland and the High Court of Australia and practiced as a succession law solicitor on the Gold Coast. A member of the Australian Centre for Health Law Research, her academic journey has been shaped by a commitment to understanding and addressing the legal response to elder financial abuse through rigorous research and analysis.

Reid Kress Weisbord

Reid Kress Weisbord is a Distinguished Professor of Law and the Judge Norma L. Shapiro Scholar at Rutgers Law School and a Visiting Professor of Law at Columbia Law School. His scholarship focuses on the law of wealth transfer, probate, and property. Weisbord is co-author of the CCH treatise, *Estate Planning* by Casner, Pennell, and Weisbord, and the Aspen textbook, *Wills, Trusts, and Estates: The Essentials*. His scholarly publications include more than 50 law review articles, essays, and book chapters. Weisbord is an elected Academic Fellow of the American College of Trust and Estate Counsel, Associate Editor of the ACTEC Law Journal, Chair-Elect of the American Association of Law Schools' Trusts & Estates Section, and Co-Editor of the Trusts & Estates Section of *Jotwell*. He served as Vice Dean of Rutgers Law School from 2013 to 2019.



Emalee G. Welsh

Emalee G. Welsh advises high-net-worth individuals, owners of privately held businesses, entrepreneurs, and multigenerational family groups regarding planning for estate and gift taxes, family business succession, and philanthropy. Emalee counsels clients located across the United States and internationally regarding the management of their personal financial interests. She devotes a significant proportion of her time helping to design and implement sophisticated wealth transfer plans and is especially passionate about preparing the next generation as they become stewards of their family wealth.

Danaya Wright

Danaya Wright is the T. Terrell Sessums & Gerald Sohn Professor of Constitutional Law at the University of Florida Levin College of Law. Professor Wright is also an affiliate professor in the Departments of History and Gender, Sexualities, and Women's Studies Research.

One of Professor Wright's principal areas of research is on the origins of English family law, particularly nineteenth century reforms in the area of child custody and divorce law. Two of her articles in this area were chosen best papers at the 1st and 3rd Stanford/Yale Junior Faculty Forum competitions for young scholars, and another article won the Donald Sutherland prize for the most significant work in English Legal History from the American Society for Legal History. She is currently writing a book on the history of judicial interference in the family and constructions of public and private patriarchy.

She has authored a popular casebook on trusts and estates and is deeply involved in finding legislative solutions to the heirs property problems plaguing vulnerable homeowners, especially in the South. She has received numerous grants to facilitate empirical work on property losses as well as probate barriers and the need for intestacy reforms, especially for decedents and heirs in non-traditional families.

She holds an AB in English from Cornell University, an MA in English from the University of Arizona, an MA in Liberal Education from St. John's College, a JD from Cornell University, and a PhD in Political Science from the Johns Hopkins University. She joined the faculty of the University of Florida Levin College of Law in 1998.

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