



## James R. Wade

Wade Ash Woods Hill & Farley, P.C.  
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### PRESENT POSITION AND AFFILIATIONS:

Shareholder and Officer, Wade Ash Woods Hill & Farley, P.C. (Denver, Colorado)  
Joint Editorial Board of Uniform Trust and Estate Acts - State Courts Liaison  
Member, National College of Probate Judges; International Academy of Estate and Trust  
Law; American Law Institute; Fellow, American College of Trust and Estate  
Counsel  
American Bar Association Real Property, Probate and Trust Law Section - Liaison to  
National College of Probate Judges  
Advisor, American Law Institute, Restatement of Trusts Third  
Listed, Best Lawyers in America (1987 to present)

### PREVIOUS POSITIONS AND AFFILIATIONS:

Judge, Denver Probate Court (1977 - 1982)  
Lecturer, National Judicial College (Reno, Nevada) (Specialty Course in Probate)  
Lecturer, National Center for State Courts (Williamsburg, Virginia) (Specialty Course in  
Probate)  
Lecturer, University of Denver College of Law Program for Advanced Professional  
Development (15-hour course in Estate Administration) (1983, 1984, 1987)  
Lecturer, University of Denver College of Law (1980, 1982-83, 1984-85, 1988, 1989-90)  
and University of Colorado Law School (1984) (Law School basic courses in Wills,  
Trusts and Estates; University of Denver - two quarters; University of Colorado -  
one semester)  
Visiting Professor, McGeorge School of Law (University of the Pacific), Sacramento,  
California, 1994.  
Visiting Professor, University of Miami Graduate Program in Estate Planning, March  
1995; February 1996.

Chairman, American Bar Association Real Property, Probate and Trust Law Section  
Committees on Role, Function and Liability of the Estate Lawyer, and on Creditors  
Rights; Council Member; Officer American Bar Association Liaison to National  
Conference of Commissioners on Uniform State Laws, Custodial Trust Act Project  
Chairman, Colorado Bar Association, Probate and Trust Law Section; Board of Governors,  
Colorado Bar Association  
Chair, Colorado Bar Fellows  
Trustee, Clayton College Trust (1986-1992)  
Member, Fordham Law School Conference on Ethical Issues in Representing Older  
Clients (1993)  
Regent and Committee Chair, American College of Trust and Estate Counsel  
Recipient, Treat Award for Excellence in Probate, National College of Probate Judges,  
1994  
Advisor, NRI Panel on Developing a Trust Code for the People's Republic, Beijing, China,  
1996  
Amakasu Charitable Trust Law Lecturer, Tokyo, Japan, 1998  
Member, Colorado Supreme Court Committee on Civil Jury Instructions; Governor's  
Commission on Life and the Law  
Trustee, Colorado Bar Foundation  
Member, ABA Special Probate and Trust Division Study Committee on Professional  
Responsibility  
Member, Commission on National Probate Court Standards (National College of Probate  
Judges-National Center for State Courts)  
Advisor to National Conference of Commissioners on Uniform State Laws, Uniform  
Guardianship and Protective Proceedings Act  
Invited Conferee, University of Georgia Law School Conference on Legal and Ethical  
Aspects of Dementia, 2001  
Invited Conferee, WINGSPAN, The Second National Guardianship Conference, 2002.  
Recipient, Richard Doyle Award of Excellence, Colorado Bar Association/Continuing  
Legal Education, December, 2003.  
Commission on Law and Agent, Commissioner and Liaison, Commissioner (1995-1998);  
Liaison from the American Bar Association (1998-2008)

#### EDUCATIONAL BACKGROUND:

Princeton University, A.B., 1959 (Woodrow Wilson School of Public and International  
Affairs)  
Harvard Law School, L.L.B., 1962

## PUBLICATIONS:

### Books and Practice Materials

Wade/Parks Colorado Law of Wills, Trusts and Fiduciary Administration (formerly Parks' Colorado Probate Practice Manual) (2004, Continuing Legal Education in Colorado) (substantive law oriented)

Colorado Probate System (2007, Continuing Legal Education in Colorado) (Basic Practice Manual)

Colorado Estate Administration, Advanced and Non-Routine Aspects (1982, National Center for Continuing Legal Education, Inc.)

Colorado Estate Planning (1985 Ed., Continuing Legal Education in Colorado, Inc.); author of Chapter 29 on Colorado Estate Tax

"So Now You Are A Guardian"; "So Now You Are A Conservator"; and "So Now You Are A Personal Representative" (Original author of fiduciary pamphlets published by the Colorado Bar Association, 1982, for circulation to members of the Probate and Trust Law Section and the Colorado Probate Courts by the Bar Association and the State Court Administrator's Office)

### Articles

"How to Avoid Malpractice," National Law Journal, p. 17 (July 7, 1980)

"Surcharge Litigation - Miscellaneous Aspects," (portion of series of articles on "Surcharge Litigation - How to Avoid It"), 16 Real Property, Probate and Trust Journal, p. 760 (Winter 1981 issue)

"When Can a Lawyer Represent Both Husband and Wife in Estate Planning?" Probate and Property, Volume 1, No. 2 (March/April 1987).

"The Uniform Custodial Trust Act", Probate and Property, Volume 1, No. 6 (November/December 1987).

"1987 Developments in Probate and Trust Law," 23 Real Property Probate and Trust Law Journal, p. 27, (Summer 1988)

"Published Notice is not Enough," Probate and Property, Volume 2, No. 5, (September/October, 1988).

Report of the Special Committee on Professional Responsibility, "Preparation of Wills and Trusts That Name Drafting Lawyer as Fiduciary" (JRW principal drafter), 28 Real Property Probate and Trust Law Journal p.803 (Winter 1994).

"Representation of Clients under a Disability - Recent Developments," Trusts & Estates, Volume 136, No. 6, May 1997.

"Colorado's Adoption of the Uniform Probate Code," Probate Law Journal of Ohio, September/October 2002.

"Gifting Without Explicit Authority," Trusts & Estates, Volume 142, No. 6, July 2003.

Colorado Lawyer Articles:

Bond Practice Under the Colorado Probate Code, March 1975, p. 269

Probate Avoidance Under the Colorado Probate Code, August 1975, p. 1665

Transferring a Trust to a More Appropriate Location, August 1976, p. 1001

1976 Tax Reform Act-Basis Rules, September 1977, p. 1563

1976 Tax Reform Act-Distributions From Estates, November 1977, p. 1949

The Court Trust, A Conservatorship Alternative, August 1978, p. 1341

Disclaimers Under the Colorado Probate Code, September 1978, p. 1606

Minors' Personal Injury Settlements, April 1979, p. 632

New Guardianship Law and Practice, August 1979, p. 1454

Creditors' Rights Against Non-Probate Assets, February 1980, p. 1568

Professional Responsibilities and the Estate Lawyer, August 1980, p. 1568

Notice Requirements Under the Colorado Probate Code, April 1981, p. 759

Ante Mortem Probate: An Idea Whose Time Has Come? November 1981, p. 2834

Fiduciary Accounting - Are the Ground Rules Clear? May 1982, p. 1192

Disposition of Last Remains (Pre-Death Aspects), December 1982, p. 2986

Disposition of Last Remains (Post-Death Aspects), March 1983, p. 439

Uniform Marital Property Act, February 1984, p. 220

Notice and Due Process in Probate Revisited, January 1985, p. 29

Uniform State Laws of Interest to Colorado Lawyers, November 1985, p. 1961

Trust Termination and Modification, March 1986, p. 389

Published Notice Held Ineffective as to Known Creditors, July 1988, p. 1320

The "New" Prudent Investor Rule, April 1991, p. 713

Introduction to Colorado's New Principal and Income Act, March 2001, p. 55

The Uniform Transfers to Minors Act: Extending the Period of Protection, January 2006, p. 27

Printed Program Materials (Since 1999 – Selected)

“Multi Disciplinary Practice From the Perspective of a Small (Boutique) Law Firm Practitioner”, American College of Trust and Estate Counsel, Scottsdale, Arizona, February 2000.

“When Emotions and Law Mix: End of Life Issues from Both Perspectives”, National Association of Personal Financial Planners, Minneapolis, Minnesota, May 2000.

Report of ACTEC Task Force 2000, American College of Trust and Estate Counsel, Boca Raton, Florida, March 2001.

“Drafting, Funding and Administering Revocable Living Trusts in Colorado,” Halfmoon, LLC, Denver, Colorado, July 2001.

“What to Do About Estate Tax Reform?”, Colorado Bar Convention, Vail, Colorado, September 2001.

“Colorado’s New Principal and Income Act,” Colorado Chapter of the American College of Trust and Estate Counsel, Vail, Colorado, September 2001.

Colorado Estate Planning Forms, Colorado Bar Association CLE, January 18, 2002 and February 1, 2002.

“Modification, Reformation and Termination of Trusts Under Existing Law and the Anticipated Colorado Trust Code,” 2002 Estate Planning Retreat, CLE in Colorado, Inc., Steamboat Springs, Colorado, June 20-22, 2002.

“Estate Planning Methods for Impending Death,” Boulder Estate Planning Council, February 11, 2003.

“Law Reform in Colorado - The Uniform Probate Code Model,” National Perspectives on Connecticut Probate Courts, New Haven, Connecticut, October 10, 2003.

American Association of Homes And Services for Aging Annual Meeting and Exposition, Caregiving Town Hall Meeting Participant, Denver, Colorado, October 27, 2003.

“Everything You Wanted to Know About Elder Law Without Going to Law School,” 10<sup>th</sup> Annual Interdisciplinary Institute, University of Denver Law School, March 29, 2004.

“Everything You Wanted to Know About Elder Law Without Going to Law School,” 11<sup>th</sup> Annual Interdisciplinary Institute, University of Denver Law School, March 15, 2005.