PROFESSIONALS

SYMPOSIUM2024

Rady Children's

Robert K. Kirkland

Kirkland Woods & Martinsen LLP

Bob Kirkland is the founding partner of the law firm of Kirkland Woods & Martinsen LLP, which has offices in Liberty, Missouri, Springfield, Missouri, Clayton, Missouri and Overland Park, Kansas. He is licensed to practice law in Missouri and Kansas. He works with a variety of individual clients, handling the preparation of estate planning instruments, and counseling clients in the areas of estate and gift tax minimization, probate avoidance, gifting techniques, asset protection, charitable planning, and business succession planning. He also advises fiduciaries in estate, conservatorship, and trust administration matters. Mr. Kirkland has successfully completed the Effective Probate Mediation Training course sponsored by ACTEC, and frequently serves as a mediator of trust and estate disputes.

SPEAKER BIOGRAPHY

Mr. Kirkland is a Fellow of the American College of Trust and Estate Counsel ("ACTEC"), is a past Missouri State Chair of ACTEC, and a past member of the ACTEC Board of Regents and ACTEC Executive Committee. He is also a member of the Employee Benefits Committee (past Chair), Digital Property Committee, Family Law Task Force, as well as a past Chair of the ACTEC Sponsorship Advisory Committee and Bylaws and Manuals Committee. He is listed in the last twenty-plus editions of The Best Lawyers in America and the most recent additions of Super Lawyers. Kirkland is Chambers ranked in High Net Worth.

Among several professional and civic activities, Mr. Kirkland serves as a Vice Chair of the Missouri Bar Probate and Trust Committee, and a past member of the editorial board of Trusts and Estates magazine. He is also the founding Chancellor of the Heart of America ACTEC Fellows Institute.

Mr. Kirkland is a frequent author and lecturer in the estate planning and charitable giving areas. He has lectured on a variety of topics at seminars sponsored by ACTEC, The Heckerling Institute, ALI-CLE, Society of Trust and Estate Practitioners, The Missouri Bar, The Kansas Bar Association, The Iowa Bar, IICLE, The Ohio Bar, The Idaho Bar, The Florida Bar, The Oklahoma Bar Association, the Hawaii Tax Institute, the Southern Federal Tax Institute, the Notre Dame Estate Planning Institute, the Duke University Estate Planning Conference, the ACTEC Florida Fellows Institute, the UCLA Institute on Estate Planning, The MO-KAN Trust Conference, the Financial Services Professionals, the American Heart Association, and the Estate Planning Councils of Baltimore, Charlotte, Greenville, Little Rock, Louisville, Naples, New York City, Philadelphia, St. Louis, Boca Raton, Broward County and West Palm Beach.

Mr. Kirkland holds a B.S. in accounting from William Jewell College (1980), a J.D. from the University of Missouri-Kansas City School of Law (1983), and an L.L.M. in estate planning from the University of Miami, Florida School of Law (1985). During his tenure at the UMKC School of Law, he served as Managing Editor of the UMKC Law Review.

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Tom Rogerson
President and CEO
GenLeg Co., Inc.

SPEAKER BIOGRAPHY

Tom is a recognized leader and pioneer in family governance and legacy planning. He had the privilege of meeting Jay Hughes over 30 years ago who inspired him to transform his practice from "Preparing the Money for the Family" to "Preparing the Family for the Money." Using his Seven-Steps to Healthy Family Governance, Tom has worked with over 300 families facilitating family meetings focusing on: creating a legacy culture with an entrepreneurial mindset, philanthropic vision, legacy planning, succession development and endowing the process for the future, all to create a generational family.

In 2017 Tom teamed up with his wife Cathy, a certified relationship coach, and started GenLeg Co., Inc. Together they provide guidance and education to families and their advisors, helping them transition significant capital, both financial (tangible) and human (intangible), from one generation to the next.

Prior to starting a private family legacy consulting practice, Tom was with Wilmington Trust, bringing his family governance and legacy planning expertise as both a speaker and motivator to families, and to Wilmington's client facing teams to help them integrate Family Governance into the fabric of the client relationship. Previously, Tom was Managing Director of Family Wealth Services for BNY Mellon, National Director of Estate Tax Planning with State Street Global Advisors, and Director of Financial and Estate Tax Planning with Coopers and Lybrand. He holds a bachelor's in Economics from Ithaca College.

Tom has spoken for The World Presidents Organization (now YPO Gold), Harvard University Business School, TIGER21, The Lincoln Center, Yale University, Dallas Theological Seminary, Vistage, Museum of Modern Art, The Nature Conservancy, New York Botanical Garden, The Dallas Foundation, The New York Community Trust, The Boston Foundation, Heckerling, The Catholic Foundation, numerous estate planning councils, as well as many other organizations.

EXPERTISE IN:

- Strategies for defining & implementing Family Legacy planning
- Creating and maintaining a family Entrepreneurial mindset in the family
- Managing Family Conflict
- Family governance
- Family education and communication
- Family Philanthropic planning and implementation
- Family coaching and family meeting moderating
- SPIN and Challenger sales training and messaging
- Licensed in ILS and DISC

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Nicole Carr-Lee, PsyD
Director of Clinical Operations and Integration – Transforming Mental Health
Rady Children's Hospital – San Diego

SPEAKER BIOGRAPHY

Dr. Nicole Carr-Lee is a licensed bilingual clinical psychologist who grew up in San Diego, California and attended elementary, middle, and high school in San Diego. She attended the University of California, Los Angeles to obtain her Bachelor of Arts degree in Psychology. After a short break from school, during which time she worked for an accounting firm, she began her graduate studies. Dr. Carr-Lee earned her Master of Science in Clinical Psychology and Doctor of Psychology in Clinical Psychology degrees from the PGSP-Stanford PsyD Consortium. After living in northern California for 4 years, Dr. Carr-Lee was happy to come back to southern California. She was previously employed as a clinical psychologist in the Los Angeles area where she worked for the Child and Family Guidance Center in Van Nuys, CA with children, adolescents, and families. Dr. Carr-Lee has trained in various mental health settings including Veterans Affairs, county mental health, and outpatient mental health clinics. Dr. Carr-Lee became passionate about integrated care when she worked as a Behavioral Health Consultant at San Ysidro Health, a federally qualified health center, for six and a half years. During that time, she worked with patients of all ages (from five years old to late 80s), within the primary care setting. Much of her work was with monolingual Spanish speaking patients. During her time at San Ysidro Health she was promoted from a Behavioral Health Consultant to a Behavioral Health Clinic Director.

In 2021, Nicole Carr-Lee, PsyD, joined the Rady Children's Hospital Transforming Mental Health Initiative team as a supervisor and in June 2022 was promoted to her current role as Director of Clinical Operations. Her areas of professional expertise include children with anxiety, adolescents and families, underserved populations, and victims of trauma. She has given various talks in the community and at national conferences about mental health and integrated health care and enjoys educating others on these vitally important topics. In her free time, she enjoys spending time with family and friends, watching movies, and baking. She loves traveling with her family and spends much of her weekend time in fun activities with her children.