

ALYSSA A. DIRUSSO

Cumberland School of Law
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ACADEMIC APPOINTMENTS

Cumberland School of Law at Samford University (Tenured 2010)

(Assistant Professor 2005-2008; Associate Professor 2008-2011; Professor 2011-present)
Teaching Responsibilities: Wills, Trusts & Estates; Estate and Gift Tax; Property;
Estate and Trust Administration.

EDUCATION

Juris Doctor, The University of Texas School of Law (1999)

GPA: 3.78, Top 10%, Honors, Order of the Coif
Journal Member: *The Review of Litigation*

Bachelor of Science, Carnegie Mellon University (1996)

Degree in Psychology, Additional Major in Professional Writing
GPA: 3.85, Top 5%, Phi Beta Kappa, Dean's List, College and University Honors

PRACTICE EXPERIENCE

Private Bank Counsel – Bank of America Corporation (2004 –2005)

Counsel – FleetBoston Financial Corporation (2001 –2004)

Served as in-house legal counsel to Bank of America and Fleet National Bank.

Provided responsive legal advice, analysis and support to the Private Bank at Bank of America and its predecessor Fleet wealth and asset management organizations. Created solutions for issues relating to personal trusts, charitable trusts, and investment management for individuals and nonprofit institutions. Advised \$66 million corporate private foundation and \$82 million donor advised fund. Counseled business leaders on topics including fiduciary duties and powers, trust and estate litigation, OCC regulation, common trust funds, wills and probate, transfer taxes, tax-exempt status, trust reformations, and charitable giving. Guided business lines in responding to relevant legislation, trained relationship managers on legal matters, and researched issues under federal and local law.

Associate Attorney – Choate, Hall & Stewart (1999 –2001)

Member of Trusts & Estates Department in large top-tier Boston law firm.

Created estate plans for clients with net worth ranging from very little to nearly a billion dollars. Drafted complex estate planning documents such as QPRTs, GRATs, ILITs and CLTs. Researched cutting-edge estate planning, estate and trust administration, and retirement benefit issues emphasizing tax implications. Implemented sophisticated wealth transfer techniques involving gifts of family business interests, conservation easements, valuation discounts, and installment sales. Secured tax-exempt status for dozens of new private foundations and public charities. Advised high-profile charities on complex issues including intermediate sanctions, tax-exempt bond issuance, corporate sponsorship, and lobbying rules.

PUBLICATIONS OF LEGAL SCHOLARSHIP

- *Law and Literature Junior: Lawyers in Books for Young Children*, 10 WHITTIER J. OF CHILD & FAMILY ADVOCACY __ (forthcoming 2012)(with Letitia Van Campen).
- *American Nonprofit Law in Comparative Perspective*, 10 WASH. U. GLOBAL STUDIES L. REV. 1 (2011).
- *Testacy and Intestacy: The Dynamics of Wills and Demographic Status*, 23 QUINNIPIAC PROB. L.J. 36 (2009).
- *Marketing Wills*, 16 ELDER L. J. 33 (2008)(with Michael R. McCunney).
- *He Says, She Asks: Gender, Language, and the Law of Precatory Words in Wills*, 22 WIS. WOMEN'S L.J. 1 (2007).
- *Supporting the Supporting Organization: The Potential and Exploitation of 509(a)(3) Charities*, 39 IND. L. REV. 207 (2006).
- *Statutory Techniques for Balancing the Financial Interests of Trust Beneficiaries*, 39 U.S.F. L. REV. 261 (2005)(with Kathleen M. Sablone).

ADDITIONAL PUBLICATIONS

- *Making Cents of Intestate Distributions*, in STEVE FRIEDLAND, GERRY HESS, MICHAEL SCHWARTZ & SOPHIE SPARROW, *TECHNIQUES FOR TEACHING LAW* 2 88-89 (Carolina Press, 2011).
- *The Big Questions of Philanthropy Law in a Delightful Snack-Size Portion*, JOTWELL: Trusts and Estates (2011)(review of Ray D. Madoff, *What Leona Helmsley Can Teach Us About the Charitable Deduction*, 85 CHI.-KENT L. REV. 957 (2010); available at <http://trustest.jotwell.com>.
- *Why Retirement Is Better than Death: Taxes*, 30 ABA TAX SECTION NEWS QUARTERLY 9 (2010).
- *The Effect of State and Federal Regulation on Charitable Giving: A Historical Analysis*, JOTWELL: Trusts and Estates (2010)(review of Kristine S. Knaplund, *Charity for the Death Tax? The Impact of Legislation on Charitable Bequests*, 45 GONZ. L. REV. 713 (2010)), available at <http://trustest.jotwell.com>.
- 2009 Update of Dwight F. Bickel, *LIVING TRUSTS: FORMS AND PRACTICE* (Matthew Bender, 2009).
- *Prof. Alyssa A. DiRusso on Precatory Language*, Lexis Expert Commentary (2008).
- *DiRusso on the Power to Adjust under the Principal and Income Act*, Lexis Expert Commentary (2008).
- *DiRusso on Statutory Unitrust Elections*, Lexis Expert Commentary (2008).
- "Tactile Learning in the Wills Classroom," *The Law Teacher*, Vol. 14, No. 2, p. 4-5 (2007).
- "Law Schools Are Enriched by the Perspectives of New Professors," *Student Lawyer*, Vol. 34, No. 5, p. 14 (January 2006).
- "Beginner's Mind: Thoughts from a New Law Professor," *The Law Teacher*, Vol. 13, No. 2, p. 11 (2006).
- "Tenure-Track Law Professorships," *The Young Lawyer*, Vol. 9, No. 10, p. 5 (July/August 2005).

- “The Ultimate Balancing Act: Lawyering and Parenting,” *The Young Lawyer*, Vol. 8, No. 10, p. 6 (July/August 2004).
- “The Function of Gesture in Learning to Count: More Than Keeping Track,” *Cognitive Development*, Vol. 14, Issue 1, pp. 37-56 (Jan-March 1999)(with Martha Wagner Alibali).

PRESENTATIONS AND PANELS

- *Lawyers in Books for Young Children/ Contemporary Issues in Law & Literature*
 - Panel Presentation at Annual Meeting of the Southeastern Association of Law Schools in Hilton Head, South Carolina (August 2011).
 - Oral Presentation at John Marshall Law School Faculty Symposium in Atlanta, Georgia (April 2011).
 - Oral Presentation at Cumberland School of Law Faculty Symposium in Birmingham, Alabama (March 2011).
- *Integrating Real-Life Practice, Micro-Lawyering, and Simulations*
 - Panel Presentation at Annual Meeting of the Institute for Law School Teaching and Learning in New York City, New York (June 2011).
- *Comparative Philanthropy Law and the Tax-Centrism of the American Third Sector/ American Nonprofit Law in Comparative Perspective*
 - Poster Presentation at Annual Meeting of the American Association of Law Schools in San Francisco, California (January 2011).
 - Poster Presentation at Ninth International Conference of the International Society for Third-Sector Research at Kadir Has University in Istanbul, Turkey (July 2010).
- *The Reason Why Retirement Is Better Than Death: Taxes*
 - Panel Presentation at Trusts & Estates/Employee Benefits Workshop at Annual Meeting of the Southeastern Association of Law Schools in Palm Beach, Florida (July 2010).
- *Meeting Your Client: Initial Steps in Estate Planning Practice (Recent Graduate CLE)*
 - Presentation at Cumberland School of Law CLE for Recent Graduates in Birmingham, Alabama (September 2010).
 - Presentation at Cumberland School of Law CLE for Recent Graduates in Birmingham, Alabama (October 2009).
- *Assessing Lawyering Skills (Lawyering Exercises in Trusts & Estates Courses)*
 - Presentation at Cumberland Faculty Retreat in Birmingham, Alabama (August 2009).
 - Panel Presentation at Annual Meeting of the Southeastern Association of Law Schools in Amelia Island, Florida (July 2009).
- *Euthanizing Small Charities*
 - Poster Presentation at Annual Meeting of the American Association of Law Schools in San Diego, California (January 2009).
 - Poster Presentation at Eighth International Conference of the International Society for Third-Sector Research in Barcelona, Spain (July 2008).

- *The Intestacy Epidemic and the Marketing of Wills/Marketing Wills*
 - Panel Presentation at Annual Meeting of the Southeastern Association of Law Schools in Amelia Island, Florida (July 2007).
 - Poster Presentation at Annual Meeting of the American Association of Law Schools in New York, New York (January 2008).
 - Oral Presentation at Cumberland School of Law Faculty Symposium in Birmingham, Alabama (March 2008).
- *He Says, She Asks: Gender, Language, and the Law of Precatory Words in Wills*
 - Oral Presentation at Texas Tech School of Law Works-in-Progress Colloquium in Lubbock, Texas (October 2006).
 - Oral Presentation at Cumberland School of Law Faculty Symposium in Birmingham, Alabama (October 2006).
 - Poster Presentation at Annual Meeting of the American Association of Law Schools in Washington, D.C. (January 2007).
 - Poster Presentation at Annual Meeting of Law and Society Association in Berlin, Germany (July 2007).
- *Supporting the Supporting Organization: The Potential and Exploitation of 509(a)(3) Charities*
 - Oral Presentation at Cumberland School of Law Faculty Symposium in Birmingham, Alabama (October 2005).
 - Poster Presentation at Annual Meeting of the American Association of Law Schools in Washington, D.C. (January 2006).
 - Oral Presentation at Florida State University School of Law in Tallahassee, Florida (February 2006).

PROFESSIONAL ACTIVITIES AND HONORS

- Lightfoot, Franklin & White Junior Faculty Scholarship Award (2010)
- Harvey S. Jackson Teaching Excellence Award (2009)
- Lightfoot, Franklin & White Junior Faculty Scholarship Award (2007)
- Contributing Editor: JOTWELL, TRUSTS & ESTATES
- Member, ABA Tax Section Task Force (provided comments to Treasury on proposed supporting organizations regulations)
- Member of American Bar Association (Tax and Real Property & Probate Sections)
- Member of American Association of Law Schools (Fiduciary and Nonprofit & Philanthropy Law Sections)
- Member of Law and Society Association
- Member of International Society for Third-Sector Research
- Licensed Attorney – Massachusetts (since 1999)

SCHOOL AND UNIVERSITY SERVICE

- Rank & Tenure Committee
- Appointments Committee
- Library Committee (past Chair)
- Admissions Committee/Loans and Scholarships Committee
- Curriculum Committee
- Faculty Development/Colloquium Committee
- Carnegie Report/Skills and Outcomes Committee
- Faculty Advisor to VITA (Volunteer Income Tax Assistance), Catholic Law Students Association, and Virginia Law Students Association
- Presenter at multiple Cumberland CLE programs
- University Academic Affairs Committee
- University Institutional Review Board (Chair-Elect 2009-2010; Chair 2010-2011)

ONLINE INFORMATION

- SSRN Publications available at: <http://ssrn.com/author=511853>
- Faculty Biography available at: <http://cumberland.samford.edu/faculty/alyssa-dirusso>