

PROFESSOR JOEL C. DOBRIS

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PROFESSIONAL EXPERIENCE

2008 to Present: Professor of Law, Emeritus, University of California, Davis  
1981 to 2008: Professor of Law, University of California, Davis  
Fall 1994: Visiting Professor of Law, Cardozo Law School  
1976 to 1981: Acting Professor of Law, University of California, Davis  
1966 to 1976: Milbank, Tweed, Hadley & McCloy, New York, NY

SUBJECTS TAUGHT

Property; Trusts, Wills and Decedents' Estates; Future Interests; Estate Planning;  
Estate and Gift Taxation and Planning; William & Sally Rutter, UCD  
School of Law, Distinguished Teacher Award

PUBLICATIONS

“A Letter About Investing to a New Foundation Trustee, with Some Focus on  
Socially Responsible Investing” 34 Actec Journal 234

“SRI - Shibboleth or Canard (Socially Responsible Investing, That Is)”, 42 Real  
Property Probate & Trust Journal 755

Co-editor, Dobris, Sterk & Leslie, 3d edition of Estates & Trusts

“Comment, Undoing Repeal of the Rule Against Perpetuities: Federal and State  
Tools for Breaking Perpetual Dynasty Trusts,” 27 Cardozo Law Review  
2685

“Why—five? The Strange, Magnetic and Mesmerizing Affect of the Five Percent  
Unitrust and Spending Rate on Settlers, Their Advisors, and Retirees,” 40  
Real Property Probate & Trust Journal 39

“Speculations on the Idea of ‘Speculation’ in Trust Investing: An Essay,” 39 Real  
Property Probate & Trust Journal 439

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Co-editor, Dobris, Sterk & Leslie, 2d edition of Estates & Trusts

"Federal Transfer Taxes: The Possibility of Repeal and the Post Repeal World,"  
48 Cleveland State Law Review 709

"The Death of the Rule Against Perpetuities, or the RAP Has No Friends: An  
Essay" 35 Real Property Probate & Trust Journal 601

"Changes in the Role and the Form of the Trust at the New Millennium" 62  
Albany Law Review 543

Co-editor, Dobris & Sterk, 9th edition of Ritchie, Alford, Effland, Decedents'  
Estates &, Trusts

"Why Do Trustee Investors Often Prefer Dividends to Capital Gain and Debt  
Investments to Equity?-A Daunting Principal and Income Problem"  
32 Real Property Probate & Trust Journal 255

"New Forms of Private Trusts for the 21st Century - Principal and Income" 31  
Real Property Probate and Trust Journal 1

Mortimer H. Hess Memorial Lecture, "The Probate World at the End of the  
Century, Is a New Principal and Income Act in Your Future?," 48 The  
Record 280, reprinted in slightly edited form in 28 Real Property Probate &  
Trust Journal 393

Co-editor, Ritchie, Alford, Effland & Dobris, Decedents' Estates & Trusts, 8th ed.

"Real Return, Modern Portfolio Theory and College, University and Foundation  
Decisions on Annual Spending From Principal and Income of Endowment:  
A Visit to the World of Spending Rules" 28 Real Property Probate & Trust  
Journal 49

Book Review: 52 Ohio State Law Journal 625, reprinted in 27 Real Property  
Probate & Trust Journal 559

"Boomer Twenty Years Later: An Introduction, With Some Footnotes About  
'Theory'" 54 Albany Law Review 171

Book Review: 4 Int'l J. of Law & the Family 343 (Oxford Univ. Press 1990)

Foreword: "The Modern Family Fragmented," in "Symposium: The Changing Role  
of the Family in the Law," 22 U.C. Davis Law Review 691

"A Policy View of Medicaid Asset Planning by the Elderly: Expectations,  
Entitlement and Inheritance," 24 Real Property, Probate & Trust Journal 1

"Divestment of Assets to Qualify for Medicaid: Artificial Pauperization to Qualify  
for Nursing Home and Home Care Benefits," Ch. 48 in An Aging World,  
Dilemmas and Challenges for Law and Social Policy (J. Eekelaar and D.  
Pearl ed. Clarendon Press)

"Arguments in Favor of Fiduciary Divestment of 'South African' Securities," 65 Nebraska Law Review 209

"Marshalling the Arguments in Favor of Abolishing the Capital Transfer Tax," 6 The British Tax Review 363

"A Brief for the Abolition of All Transfer Taxes," 35 Syracuse Law Review 1215

Reprinted in The Monthly Digest of Tax Articles. Extracted in Oliver & Peel, Tax Policy: Readings and Materials (1996).

"Do Contractual Will Arrangements Qualify for Qualified Terminable Interest Treatment Under ERTA?" 19 Real Property, Probate & Trust Journal 625

Reprinted in The Monthly Digest of Tax Articles

"Ethical Problems for Lawyers Upon Trust Terminations: Conflicts of Interest," 38 University of Miami Law Review 1

"Marital Deduction Estate Planning: Variations on a Classic Theme," 20 San Diego Law Review 801

Reprinted in The Monthly Digest of Tax Articles

"Limits on the Doctrine of Equitable Adjustment in Sophisticated Postmortem Tax Planning," 66 Iowa Law Review 273

Reprinted in rewritten form in The Monthly Digest of Tax Articles

"Equitable Adjustments in Postmortem Income Tax Planning: An Unremitting Diet of Worms," 65 Iowa Law Review 103

Reprinted in The Monthly Digest of Tax Articles

"Constitutional Law: New York Criminal Procedure Permitting Jury To Determine Voluntariness of a Confession Held Unconstitutional," 49 Minnesota Law Review 360

## REPORTERSHIPS

Co-reporter appointed by the National Conference of Commissioners on Uniform State Laws to amend the Revised Uniform Principal & Income Act and the Uniform Principal & Income Act

## SABBATICALS

In 1983-1984, 1989-1990, and 1999-2000 I was on sabbatical in London, England. I lived in William Goodenough House and London House (trust facilities)

maintained by the London Goodenough Trust for overseas graduates), and was an Academic Visitor at The London School of Economics and at the Institute of Advanced Legal Studies

## MEMBERSHIPS

American Law Institute, Advisory Committee, Restatement of Trusts, Prudent Investor Rule; Advisory Committee, Principles of the Law of Nonprofit Corporations; Members Consultative Group for Trusts; Members Consultative Group for Property

Academic Fellow, The American College of Trust and Estate Counsel

American Bar Association, Section of Taxation: Committee on Income of Estates and Trusts

Section of Real Property, Probate and Trust Law: Member of various committees from time to time

Association of the Bar of the City of New York

New York State Bar Association

Davis Faculty Association (Board of Directors)

Davis Emeritii Association (Board of Directors)

## LECTURES AND PAPERS PRESENTED

ABA Fall Tax Meeting (panelist on SRI)

ABA Annual Tax Meeting, Teaching Tax Section (speaker on future of the estate tax)

Speaker at Cleveland State conference on "The Death of the Death Tax"

The Institute of Advanced Legal Studies in London (a lecture on the future of the trust)

Lewinson Lecture, New York County Lawyers Association

Association of American Law Schools, Section on Donative Transfers, Fiduciaries & Estate Planning, "The New Principal & Income Act"

Hess Lecture, Association of the Bar of the City of New York

Annual New York University Estate Planning Institute, "Marital Deduction Estate Planning"

Association of American Law Schools, Section on Donative Transfers, Fiduciaries & Estate Planning, "Ethical Issues in Estate Planning"

PLI Estate Administration Program, "Powers of Appointment, Annuities, Debts and Expenses on the Federal Estate Tax Return"

Association of American Law Schools, Section on Donative Transfers, Fiduciaries & Estate Planning, "Divestment of Assets to Qualify for Medicaid"

Sixth World Conference of the International Society on Family Law: The Law and the Elderly, Tokyo, Japan, "Divestment of Assets to Qualify for Medicaid: Artificial Pauperization to Qualify for Nursing Home and Home Care Benefits"

The Institute of Advanced Legal Studies in London (a lecture on American Nuisance Law and the 20th anniversary of the Boomer case)

## GRANTS

I received a grant from the American Council of Learned Societies dispensing funds of the National Endowment for the Humanities and the John D. and Catherine T. MacArthur Foundation

## MISCELLANEOUS

Chair and Participant NYSBA & Columbia Law School Panel on Trust Investing

Participant, mini-conference & conference, NYU School of Law, Nat'l Center for Philanthropy & the Law, & TIFF, re Socially Responsible Investing

Participant and Speaker, Cardozo School of Law, Trusts Conference.

Advisory Board, Wills, Trusts & Estates Law, Legal Scholarship Network, SSRN.

I am a consultant to a large personal holding company that invests for a family group.

Participant and Speaker, Harvard University Hauser Center for Nonprofit Organizations: Conference on Accumulations of Wealth by Nonprofits

I was Chair of the Association of American Law Schools, Section on Donative Transfers, Fiduciaries & Estate Planning; a member of the executive committee of the section and a member of the nominating committee

AALS panelist and discussion leader at a two-day meeting on teaching trusts and estates in the last decade of the century

Participant & Speaker, Columbia Law School, Center for Law and Economic Studies:

Conference on the Estates, Powers & Trust Law, Principal & Income

Participant, American College of Probate Counsel Foundation Colloquy:

A Colloquy on Estate Planning, Financial Planning, and Beyond; the Next Progression; the Role for Lawyers; the Role for Law Schools

I arbitrated a massive pension fund dispute involving questions of fiduciary duty

I attended Henry Manne's Law and Economics Program

I attended the 3rd Annual Conference on Law, Biology & Human Behavior sponsored by the Gruter Institute

I was the faculty speaker at several of our Law School graduations

I was a contributor to The World Book Encyclopedia

I was a board member and officer of the Davis Faculty Association

I have acted as an expert witness

I have given speeches to the Sacramento Estate Planning Council

I have been the class representative for my law school class, interview applicants to Yale College and I was the California representative for The London Goodenough Trust for Overseas Graduates

## CAMPUS AND LAW SCHOOL COMMITTEES

Law School Dean Search Committee; Campus Educational Policy Committee; Campus Committee on Admissions and Enrollment; Campus Committee on Undergraduate Preparatory and Remedial Education; Campus Identity Study Committee; Campus Undergraduate Awards Committee; Campus Emeritus Committee; At-Large Representative to the Davis Division of the Academic Senate's Representative Assembly; Law School Educational Policy Committee; Chair, Admissions Committee; Faculty Recruitment Committee; Law School Personnel Committee; Academic Appeals Committee; Chair, Honors and Awards Committee; Criminal Justice Center Committee; Chair, Clinical Advisory Committee; Chair of an Above-Scale Committee; Chair of a Tenure Committee; Tenure Committees and Promotion Committees

## PRACTICE EXPERIENCE

I am a retired member of the New York Bar

Wills, Trusts, Estate Planning, Estate and Trust Administration, Postmortem Planning, Charitable Corporations

## EDUCATION

B.A. 1963, Yale College

LL.B. 1966, University of Minnesota (Articles Editor, Minnesota Law Review)