Robert M. Pullis, J.D., LL.M.
Attorney and Counselor at Law

VITA

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EDUCATION:

Master of Laws in Taxation (LL.M.), University of Houston Law Center, Houston, TX (2006)*
Master of Laws in Estate Planning & Taxation (LL.M.), University of Miami School of Law, Coral Gables, FL (1999)*
Juris Doctorate (J.D.), Oklahoma City University School of Law, Oklahoma City, OK (1997)
Graduate hours (18) in Criminal Justice, Grambling State University as of May 2018.
Graduate hours (18) in Mass Communications, Grambling State University as of May 2018.
Master of Education (*M.Ed. Guidance Counseling*) Northeast Louisiana University, Monroe, LA (1986)
Bachelor of Science in Professional Aviation (B.S.), Louisiana Tech University, Ruston, LA (1991)
Bachelor of Arts in Sociology (B.A.), Northeast Louisiana University, Monroe, LA (1985)
Please note that LL.M. degrees in law are post-doctoral degrees.

EXPERIENCE:

Nov 2012 – Present

Robert W. Levy Endowed Professor in Business and Law.
Faculty member ("Professional in Residence") in the College of Business, Department of Marketing & Analysis, at Louisiana Tech University, Ruston, Louisiana, teaching full time in the areas of Business Law, Business Communications, and Consumer Finance & Money Management.

Graduate faculty status (MBA courses) from 2014 to present.

Chair, University Grievance Committee (appointed by President L. K. Guice), January 2015 to present.

Member, University Instructional Policy Committee (IPC)
September 2018 to present.

Member, College of Business Undergraduate Policies and Assessment Committee (UPAC), February 2016 to present.

June 2003 – Nov 2012

Solo private law practice in the areas of bankruptcy, taxation, estate planning, asset protection planning using Ltd. Partnerships, Family Ltd. Partnerships, and Foreign (Offshore) Trusts, Foreign Corporations and LLCs, probate and trust administration, and business transactions. Business transactions included advising clients concerning choice of business entity, drafting Articles of Incorporation, LLC Regulations, partnership agreements, and buy/sell arrangements and advising employers regarding discrimination issues under Title VII & Title IX.

2002 - 2003	Vice President & Trust Officer, Merrill Lynch Trust Co., Houston, Texas. Regional Estates Trust Officer performing trust and probate estate administration for high-net-worth clients covering the western United States. Duties included implementing trust provisions that arise from the death of the trust settler including funding various estate planning trusts, supervision of the federal estate tax return (IRS Form 706) and any related state returns and coordination with ancillary executors/trustees including foreign fiduciaries.
1999 - 2002	Partner, Creighton & Pullis, LLP, Attorneys at Law, Conroe, Texas Licensed to practice in Texas, United States Tax Court, and United States Federal Court & Bankruptcy Court. Law practice focused mainly on tax and estate planning, probate, consumer bankruptcy, and business law.
1998 - 1999	Graduate law student, University of Miami, Coral Gables, Florida Graduate law program in Estate Planning. LL.M. degree awarded May 1999.
1994 - 1997	Law student, Oklahoma City University School of Law (graduated top 10%).
1991 - 1994	Commercial Pilot: employed as a Flight and Ground Instructor, First Officer: C-90 King Air, Omniflight Inc. (Air-ambulance), First Officer (EMB-120), Comair Airlines, Cincinnati, Ohio.
1989 - 1991	Regional Representative, PROMPT Associates, Providing statistical data to the insurance industry. Dallas/Ft. Worth, Texas.
1986 - 1989	Claims Adjuster, Commercial Union Insurance Company, Ruston, Louisiana.

LICENSES:

Licensed to practice law in the following jurisdictions:
- Texas (all state courts): Texas Bar Number 24003633
- United States Federal District Court (Southern District of Texas)
- United States Bankruptcy Court (Southern District of Texas)
- United States Tax Court (Bar Number PR0581)

CERTIFICATION:

Certified Trust and Financial Advisor (CTFA); nationally recognized certification via the Institute of Certified Bankers - American Bankers' Association.

PUBLICATIONS:

Foreign Asset-protection Trusts: Tax and Other Considerations. Lambert Academic Publishing, 2015, ISBN 978-3-659-69509-4. [A published post-doctoral (LL.M.) thesis in Tax Law.]

Foreign (Offshore) Asset-Protection Trusts: Considerations for the Entrepreneurial Executive. Article published in the peer-reviewed journal *Entrepreneurial Executive,* vol. 18, p. 29, 2013.

S-Corporations and Federal Employment Taxes: Safe Harbors and Sunken Ships.
Article published in the peer-reviewed journal *Entrepreneurial Executive,* vol. 14, p. 95, 2009.

Foreign (Offshore) Asset-Protection Trusts: Taxation, Tax Crimes, and Ethical Considerations for the Drafting Attorney. The University of Houston Law Center (2006).

SPEAKING:

Make Your Bed Financially presented to the Beta Psi Chapter, Delta Sigma Pi, Louisiana Tech University, March 2018.

Advising clients: Business Planning, Marketing, and Tax Issues for Owner Operators – Keeping 18 Wheels Rolling presented at the 2014 Annual Beta Alpha Psi Continuing Professional Education Seminar (for Certified Public Accountants), on December 5, 2014.

Panel Member: I-20 Corridor Accelerator Meeting on Entrepreneurship held at the College of Business, Louisiana Tech University, on March 1, 2016, and January 17, 2017.

UNIVERSITY SERVICE:

Chair, University Grievance Committee, January 2015 to present.
Appointed by President Les Guice.
Responsible for facilitating all faculty grievances filed at Louisiana Tech University and for making recommendations to the University President for any needed remedial action(s).

University Instructional Policy Committee (IPC), September 2018 to present. University-level committee. Appointed by the Dean of the College of Business as one of two committee members to represent the College of Business on the IPC. The IPC is the "higher, University-level" version of the college-level UPAC committee described below. The IPC makes recommendations to the Provost and President of Louisiana Tech University.

Undergraduate Policy and Assessment Committee (UPAC), February 2015 to present.
College of Business – college-level committee:
1. Coordinate course selection, evaluation, and assessment.
2. Recommend course additions/deletions to the Dean.
3. Evaluate curricular changes and make recommendations to the Dean.
4. Review advising guidelines for the College.
5. Identify critical needs in undergraduate education in the College.
6. Development and evaluate undergraduate assessment policies and procedures.
7. Promote recruitment, retention, and completion.

HONORS:

Delta Sigma Pi, Beta Psi Chapter – Louisiana Tech University – inducted into faculty membership on April 29, 2018.
Awarded the "Students' Choice Award for Most Helpful College of Business Faculty" May 2015.
Awarded "Honorary Coach" status by the Louisiana Tech Athletics Department for mentoring students, December 2014, and again December 2017.
Honor graduate of the Cannon Trust School (January 2003 with CTFA exam passed)
Past member, *The College of the State Bar of Texas*
Member, Phi Delta Phi International Legal Honors Fraternity (a selective-admissions fraternity)
Listed in Who's Who Among American Law Students, 1997 - 1998
Law Clerk, Municipal Counselor's Office, Litigation Division, Oklahoma City, OK, 1996 - 1997

COMMUNITY INVOLVEMENT:

Advisor to the Board of Directors, U.S. Vets, Houston, Texas. Volunteer guest speaker (personal finance & taxation), and volunteer, U. S. Vets' annual fundraiser "Guitars N' Cars" in Houston, Texas, annually since 2015. U.S. Vets is the nation's largest non-profit provider of comprehensive services to homeless and at-risk military veterans.

Frequent speaker at various fraternities, sororities, and other groups at Louisiana Tech University on the subject of personal finance and money management.

MILITARY:

U.S. Marine Corps Reserves, Officer Candidate School, 1983 - 1985, Honorable Discharge
U.S. Army Reserve, enlisted, 95th Infantry Division, 1981 - 1982, Honorable Discharge

PERSONAL:

Age: Born 1963 (55 years).
Marital Status: Happily married since 1983 to Bridgette Pullis, Ph.D., R.N.
Current Hobbies: Golf, flying, shooting, and reading.
Current U.S. passport.