WALTER S. BRISTOW III, JD, CLU, CHFC

612 Susannah Place
Lynchburg, VA 24502

Home: 434.385.7783 ***walter@bristow.net***

PROFESSIONAL PROFILE

Attorney educated in the humanities, seeking online adjunct professor or instructor teaching position. Extensive experience in teaching and applying insurance law, business law and financial planning, including estate and charitable planning. Taught continuing education classes nationwide for 30 years. High proficiency in verbal, written and public presentation skills with the ability to explain technical concepts in plain English. Published in professional and trade journals.

EDUCATION

Juris Doctorate, J. Reuben Clark Law School, Brigham Young University, Provo, UT
Bachelor of Arts, Cum Laude, Honors with Distinction, German Teaching Major with Political Science Minor, Brigham Young University, Provo, UT
Chartered Life Underwriter, American College, Bryn Mawr, PA
Chartered Financial Consultant, American College, Bryn Mawr, PA

TEACHING EXPERIENCE

Continuing Education

For the past 30 years taught continuing education courses in 35 states under the auspices of local, state, regional and national professional associations and societies.

Brigham Young University, Provo, Utah — 1974-1978

Part-time instructor, political science classes — 1977-1978
Part-time instructor, German language classes — 1974-1976

I am prepared to teach the following and similar courses:

- Federal Income Taxation
- Business Law
- Legal Environment of Business
- Tax Factors in Business Decisions
- Personal Finance
- Insurance
- Retirement and Estate Planning
- Legal Issues for Business Organizations
- Business Research and Writing
- Financial Planning
- Wealth Management
- Legal Research
- Introduction to Internet Services
- Spreadsheet Software
- Computing Fundamentals
- Elementary German

PUBLICATIONS

Books

The Moving Company: An Easy-to-Understand Explanation of Estate Planning, Hayden Bridge Publishing 1992

Journals

Navigating Section 101(j) and Related Party Rules, *National Underwriter*, January 14, 2008
Gifting the Family Business, *NAIFA Advisor Today*, November 2006
Return of Premium Term in Split Dollar Arrangements, *Broker World*, July 2006
Planning in a Chaotic Tax Environment, *Broker World*, December 2005
Long-Term Care Insurance Deductibility, *NAIFA Advisor Today*, November 2005
The Control Factor, *Broker World*, August 2004
Megatrends: Four Fundamental Trends That Will Change the Way We Do Business, *NAIFA Advisor Today*, December 2003
Sixteen Other Reasons to Buy Survivorship Insurance, *Broker World*, February 2003
Charitable Giving After Tax Reform: 21 Areas of Change You Need to Know About, *The Practical Accountant*, May 1988
13 Ways to Use Life Insurance for Charitable Gifts, *Fund Raising Management*, August 1987

Journals (continued)

Life Insurance and Charitable Trusts, *Journal of the American Society of Chartered Life Underwriters*, July 1986
Charitable Giving and Universal Life Insurance, *Insurance Sales*, December 1984

Seminars Authored

What's Hot and What's Not: You Can't Outrun Speeding Bullets or "What's the Fad This Week?" How to Make Money While the Merry-Go-Round Goes 'Round Ever Faster.
The Moving Company: Estate Planning Explained So a 12-Year Old Can Understand
The Charitable Forest: Stained Glass Windows and Baby Ruth Candy Bars: How to Give and Grow Rich as a Philanthropist on a Pauper's Budget.
Recent Tax Developments: Twelve Months Sisyphus Would Have Loved or What Quantum Physics and Chaos Theory Have to Do With What's Going on at the IRS and in the Halls of Congress
The 3 Secrets of Effective Communication
Newtonian vs. Quantum Physics: How it Explains Why Some People are Better at Sales than Others

RESEARCH INTERESTS

Stranger/investor owned life insurance, insurable interest and how criminal activity and economic fraud are made easier by lax enforcement of insurable interest laws.
How principles of quantum physics impact interpersonal and organizational relationships.
Intellectual property and economic issues when "information wants to be free."
How people determine what is relevant as they search for information.
Cultural foundations of the concept of privacy and whether privacy can - or should - exist tomorrow.

PROFESSIONAL ASSOCIATIONS

Oregon State Bar Association
National Association of Insurance and Financial Advisors

LICENSES

Oregon Bar (currently on "not practicing" status)
Series 6 Securities

LANGUAGES

German (intermediate speaking, advanced reading)

PROFESSIONAL EXPERIENCE

GENWORTH FINANCIAL, Lynchburg, Virginia **2002-2009**

Advanced Marketing Attorney

A $100 billion publicly traded life and annuity insurance company with 6000+ employees worldwide.

- Identified training needs of field force and assisted in the development and implementation of programs and seminars designed to educate and motivate agents, clients and professional advisors. Topics included retirement estate, business succession, and financial planning.
- Proven speaking and group presentation skills communicating to large, diverse audiences.
- Demonstrated facilitation skills and proficiency in adult learning techniques.
- Wrote extensively for company and industry publications.
- Maintained a thorough understanding of legislative, regulatory and tax trends and applied that information to conceiving, designing and coordinating projects to ensure that sales representatives and professional advisors had access to information .
- Identified and brought potential leading edge solutions from conferences, discussions with subject matter experts, journals, trade publications, tax rulings, and other sources.

GENWORTH FINANCIAL (Continued)

- Counseled teams on compliance issues in product development, operations and marketing materials. Maintained a thorough understanding of legislative, regulatory and judicial trends and applied that to develop and improve products and sales concepts.
- Coordinated reporting of department accomplishments and metrics. Developed spreadsheets tied to mainframe reporting software to consolidate and simplify the reporting process.
- Researched, analyzed, evaluated, and contributed to the development, communication and implementation of new marketing concepts, technical materials, product and services, to support the needs of the affluent individual, retirement planning, estate conservation and business succession markets.

TAX NEWS, Portland, Oregon & Lynchburg, Virginia **2001-2004**

Editor

- Reviewed and analyzed regulatory, judicial and administrative developments related to financial, estate, charitable and business planning and communicated results by authoring a weekly newsletter with a nationwide readership of over 3000.
- Created HTML versions of individual articles.
- Created and maintained a CGI database of newsletter subscribers. Supervised the weekly production of the newsletter.

STANDARD INSURANCE COMPANY, Portland, Oregon **1986-2001**

Advanced Sales Attorney

A $5.8 billion life and disability insurance company with 2000 employees and offices nationwide.

- Made continuing education presentations at local, state and national meetings.
- Advised sales associates and professional advisors nationwide on tax and financial planning issues.
- Developed marketing concepts and strategies related to estate, charitable and financial planning.
- Authored and coordinated production of a newsletter analyzing regulatory, legislative and judicial developments related to sophisticated financial planning, life insurance and annuities. Transitioned that newsletter from a print format to a fax format and then to an email format.

PRIVATE PRACTICE, Eugene, Oregon **1979-1986**

JUDGE MONROE MCKAY, U.S. 10th Circuit Court of Appeals **1979**

REFERENCES

Landis Atkinson, JD, LLM, Corporate Tax Counsel & Retirement & Protection Consumer Tax Leader at Genworth Financial at 804-662-2647 or landis.atkinson@genworth.com.

Becky Hanna, JD, CLU, ChFC, RHU, former supervisor and Vice President of Advanced Marketing at Genworth Financial at 434-948-5244 or becky.hanna@genworth.com.

Gary Underwood, JD, former co-worker and advanced marketing attorney at Genworth Financial at 434-948-5890 or gary.underwood@genworth.com.