

About the Authors

Nancy E. Shurtz, the Bernard A. Kilks Professor of Law at the University of Oregon School of Law, earned her B.A. from the University of Cincinnati, her J.D. from Ohio State University, and an LL.M. in Taxation from Georgetown Law. Prior to coming to Oregon, Professor Shurtz taught at the Wharton School of Business at the University of Pennsylvania and practiced law at the Washington D.C. firm of Ginsburg, Feldman and Bress. Professor Shurtz teaches and writes in the areas of taxation, estate planning, and sustainable business practice. She regularly addresses leading academic and policy consortiums, including the Critical Tax Conference, the Global Conference on Environmental Taxation, and the Law and Society Conference. Book publications include two leading tax hornbooks (Wolters Kluwer), *Sustainability and Business Law* (Carolina Academic Press), and *Education Planning: Taxes, Trusts & Techniques* (ABA Publishing).

Alexander B. Fitch, CRPC, AAMS, earned his B.S. from Oregon State and his M.B.A. from Seattle University. He currently works as an investment advisor representative. His areas of specialty are investment education, portfolio design, tax mitigation strategies, and retirement planning.

Robert Tirrell holds a bachelor's degree from Westfield State College. He is a 529 plan sales director at Principal Global Investors. He is responsible for positioning the tax-advantaged benefits of the Scholars Edge 529 Plan with financial professionals. Robert's public speaking and presentation skills help communicate Principal's value proposition on ways to save for education expenses at industry-sponsored virtual events, broker-dealer conferences, and directly to investors. His career is committed to excellence, partnering with financial professionals to help their clients strategize for college savings. Prior to joining Principal in 2019, Robert served as a 529 sales specialist at Voya.