ATTORNEY BIOGRAPHY

Martin I. Roos

Chief Executive Officer
Practice Group Leader
Shareholder
mroos@obht.com
210.299.2332

AREA OF EXPERIENCE

+ Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization
+ Estate Planning, Probate, and Estate Administration Law
+ Business Succession Planning, mainly with family-owned businesses
+ Charitable Planning

EDUCATION

+ J.D., University of Houston Law Center, 1990
+ B.B.A., cum laude, in Accounting, Texas A&M University, 1987

PROFESSIONAL AFFILIATIONS AND AWARDS

+ Selected by San Antonio Business Journal as an Outstanding Lawyer Award Winner in the area of Estate Planning, 2010
+ Recognized by Law & Politics and *Texas Monthly* magazine as a "Texas Super Lawyer" in the area of Estate Planning & Probate (2005-2011) Also recognized as a Texas Rising Star in the area of Estate Planning and Trusts (2004-2005)
+ Listed by *Scene in SA* magazine as one of San Antonio's Best Estate Planning and Trusts Attorneys (2004-2011)
+ Listed by *San Antonio Business Journal* as one of the city's top 40 Under Forty~San Antonio Rising Star (2004)
+ AV Rated by Martindale-Hubbell
+ State Bar of Texas - Section of Real Property, Probate, and Trust Law
+ San Antonio Estate Planners Council
+ San Antonio Young Lawyers Association, Past Officer and Director
+ Outstanding Young Lawyer, 1995

COMMUNITY

+ Big Brothers and Sisters, Board Member and Past President
+ Texas A&M University, Planned Giving Council, Member
+ Leadership San Antonio, Class XXII Member
+ San Antonio Sports Foundation, Board Member (2005-2007)
+ Jewish Community Center, Board Member (2003-2007)
+ Jewish Federation, Board Member (2001-2005)

ADMITTED

+ To the practice of law in Texas

ADDITIONAL INFORMATION

Marty was named Chief Executive Officer of the firm on February, 2011, and continues his role as Practice Group Leader of the firm's Estate Planning Practice Group.

Marty concentrates his practice in the areas of estate planning, probate, and estate administration. He has assisted clients with a broad range of business and estate planning needs. His expertise includes the design and implementation of all types of estate planning techniques.

His experience includes:

- Advising clients on the implementation of various estate planning techniques designed to minimize estate taxes
- Assisting clients with the creation of other estate planning techniques designed to shift wealth down to the next generation, including partnerships, qualified personal residence trusts, grantor retained annuity trusts, and Crummey trusts, among others
- Advising clients on matters relating to business succession planning
- Assisting clients with the creation of charitable giving techniques, including charitable lead trusts, charitable remainder trusts, and private foundations
- Developing a program that provides low cost, basic estate planning to the employees of various corporations as part of their benefits programs
- Assisting clients in the capacity of a fiduciary or beneficiary with all aspects of the administration of estates, including probating wills, handling intestate estates and estate tax returns.

In addition to his practice, Marty is a frequent author and lecturer on estate planning and probate issues. He has been featured on WOAI's San Antonio Living, in the San Antonio Business Journal, and other media.