

Estate Planning

Martin Roos

Oppenheimer, Blend, Harrison + Tate Inc.

Favorite Quote:

“Do what you like. Like what you do.”

~Life is Good

University of Houston Law Center
Years in practice: 20

BY TRAVIS E. POLING

For Martin Roos, estate law isn't just about the facts and figures. He's in it for the people.

Roos is a 20-year veteran of Oppenheimer, Blend, Harrison + Tate Inc. who recently took on the role of chief operating officer and has piled up credentials and admirers in and out of the field. Lawyers at other firms say Roos' name comes up as a top pick every time someone in San Antonio is looking for someone to handle their affairs.

“His intelligence, honesty and trustworthiness have made him a sought after confidant and attorney in the area of estate planning,” says Roger Kirstein, a shareholder at the law firm Langley & Banack. Kirstein uses Roos to handle his own family's affairs and says the attorney has the personality to put people at ease.

His reputation has earned him recognition as a Texas Super Lawyer in estate planning and probate the last five years by Texas Monthly magazine. His move through the management ranks will culminate in becoming firm CEO next year.

Roos, a Texas A&M University accounting major, earned his law degree from the University of Houston Law Center and was recruited to Oppenheimer by tax lawyer Stanley Blend. Although he started at the firm in the bankruptcy practice, Roos soon moved into estate, trust and probate law.

“I wanted a part of the law where I dealt with people,” Roos says. And in estate law he was able to get to know his clients and become “a trusted advisor” instead of just their attorney.

He has dealt with the particular challenges of estate planning for blended families, people with a net worth of \$100,000 and those with family wealth of \$100 million or more.

“Each client is different. Each will can be unique,” Roos says.

With the one-year repeal of the estate tax in 2010, Roos has been busy explaining the laws to clients in layman's language. He also is helping thousands of employees with wills and estate planning through corporate programs.

In 2004, Roos put estate planning packages — paid for through flexible spending accounts — in place for 1,800 Valero Energy employees. Valero had approached Oppenheimer, Blend about creating the program after a worker died on the job without leaving a will. The firm now works with several local companies on similar programs, including Frost Bank.

His desire to help people extends to his volunteer involvement including Big Brothers and Sisters, where he has volunteered for a decade and served as president.

When Roos joined the firm in 1990, the late Jesse Oppenheimer told him to join the Young Lawyers Association — a group for which he eventually served on the board of directors — and to get on other boards and volunteer.

Roos recalls Oppenheimer's words to him as a new young attorney in town with few connections: “Do it for the right reason, not just to network. You'll build your relationships.”

He also was selected for the Leadership San Antonio program of the Greater San Antonio Chamber of Commerce and involved in Tempel Bethel and the Jewish Federation. This year, he also was recognized by the North East Independent School District for the Superintendent's Award for a program encouraging fathers and father figures to be a positive role model for school children.

He is now passing Oppenheimer's advice on to others. “Marty has consistently encouraged and supported my community involvement, even when such endeavors can take time out of the

workday,” wrote Oppenheimer, Blend associate Lauren McLaughlin in her nomination letter for Roos. “He truly values service to our community, and not only the billable hour.”

Doing the right thing isn't always easy, but Roos' reputation is that he is unflagging in his efforts, according to lawyers outside the firm and financial industry professionals who supported his nomination.

Roos says he just remembers in contentious matters with surviving family members that he represents the estate even as he deals with emotional people.

“One of the qualities I have found unique to Marty is his diligence in ensuring a client takes action on what they have started,” says Wendy Kowalik, managing partner of financial services firm One Advocate Group. “Many times a client will get started with the planning process and it will get stalled for many reasons,” but Roos pushes them into completing their objectives.

Even though Roos is in upper management of the firm now, those working in the estate planning section on the fifth floor of the downtown Travis Park Plaza building say he still encourages his team to have a good time. Employees have dubbed that section of the firm “Happy Land.”

Roos laughs at the sentiment saying that is more because everything there seems to revolve around food more than him, including a crock pot of queso kept hot and ready by one of the staff members once a week.

“It's sad when we have a queso fund,” Roos says with a laugh, “and people start dropping by the pot at 9:30 a.m.”

TRAVIS E. POLING is a New Braunfels-based freelance writer.