

Mary E. Vandenack Curriculum Vitae

Brief Biography

Mary E. Vandenack, J.D., ACTEC, CAP®, COLPM®, Accredited Estate Planner (Distinguished) is a partner law firm of **DUGGAN BERTSCH, LLC**. Mary is a highly regarded practitioner in the areas of tax, trusts and estates, private wealth planning, asset protection planning, business exit and succession planning, and philanthropic strategies. Mary's practice serves businesses and business owners, executives, real estate developers and investors, health care providers, companies in the financial industry, and tax-exempt organizations. Mary is a member of the MWE Collective. Mary is a member of the American Bar Association Real Property Trust and Estate Section and the Law Practice Division and has served in leadership roles in both. Mary serves on the American Bar Association Cybersecurity Task Force and the Standing Committee on Technology and Information Systems. Mary has been named to ABA LTRC Distinguished Women of Legal Tech and received the James Keane Award for e-lawyering. Mary is a frequent writer and speaker on tax, asset protection planning, philanthropy, and estate planning topics as well as on technology in the practice of law and legal ethics. Mary hosts a podcast called Legal Visionaries. <https://maryvandenack.com/podcast/>

Professional Positions

- Partner – DUGGAN BERTSCH, LLC.
- Founding and Managing Member – Vandenack Weaver LLC – October 2005 to 2023.
- Founder and Chairman of the Board – Elite Concierge Trust and Estate Services LLC, Synergistic Care Coordination Services LLC, and Vandenack Services LLC.
- Consultant - Interactive Legal
- Private Practice Lawyer – 1992 to 2005 – Tax, Business, Trusts and Estates, Health Care and Asset Protection Planning Attorney – Partner at Koley Jessen PC; Fitzgerald Schorr Barmettler & Brennan; Abrahams, Kaslow & Cassman LLP; Vandenack Law Office PC.

Educational Background

- Creighton University School of Law, Omaha, Nebraska, Magna Cum Laude
- College of Saint Mary, Omaha, Nebraska, Summa Cum Laude
- University of Pennsylvania, Certificate of Positive Psychology
- University of Michigan, Master Track Certificate Social Work
- University of Nebraska Omaha, Pursuing MSW Clinical Counseling

Professional Designations

- ACTEC
- COLPM
- CAP®
- Accredited Estate Planner® (Distinguished)

Continuing Legal/Tax Education

- Federal Institute of Taxation, New York University, New York, New York: 2002, 2009-2023 with focus on partnership and real estate tax and structures; corporate tax; high net worth tax strategies and trusts and estates; international tax; state and local tax.

Mary E. Vandenack Curriculum Vitae

- Heckerling Tax Institute, Orlando, Florida: 2011-2025
- American Bar Association Real Property and Trust Spring Symposium: 2014, 2016-2020, 2022
- ACTEC Annual Meeting 2022-2025

Teaching Experience

- Creighton University School of Law – Professor Trusts and Estates, 2024
- Creighton University School of Law – Legal Research and Writing
- Creighton University School of Law – “Legal Writing” – Instructor
- VTI Institute Paralegal Studies –Business Law; Legal Research; Legal Terminology
- Fitness Instruction 2002- 2022 – yoga, pilates, spin, Bodypump and various other formats
 - Yoga Alliance RYT
 - Contemporary Pilates - Stott Pilates and Classical Pilates – Core Pilates
 - ACE Fitness Certified Group Fitness
 - AED/CPR/First Aid – since 2002

Speaking Engagements, Presentations

- Presenter – November 14, 2025, Academy of Iowa Trust and Estate Council - “AI and Estate Planning – Remaining Relevant”
- Keynote – November 6, 2025, NBI Estate Planning Summit “Guiding Clients in an Uncertain World: 2025 Recap - 2026 Horizon”
- Presenter – November 6, 2025, NBI Estate Planning Summit - “Planning With Directed Trusts”
- Keynote – November 6, 2025, NBI Estate Planning Summit - “Guiding Clients in an Uncertain World: 2025 Recap - 2026 Horizon”
- Panelist – November 6, 2025, NBI Estate Planning Summit – “Where Do We Go From Here? A Candid Discussion.”
- Presenter – November 7, 2025, Notre Dame Tax and Estate Planning Institute -“SLATs For the Modestly Wealthy Client”
- Presenter – October 23, 2025 - 56th Annual Sidney Kess Estate, Tax and Financial Planning Conference “AI and Estate Planning”
- Presenter - October 20, 2025, ACTEC Annual Meeting – “Using Copilot in Estate Planning and Agentic AI”
- Presenter – October 9, 2025, 2025 Tax & Estate Planning Forum - “Protecting Wealth: Asset Protection Planning as Part of Estate Planning”
- Presenter – October 1, 2025, Idaho Tax and Estate Planning Conference – “Artificial Intelligence and Estate Planning”
- Key Note Speaker – September 16, 2025, MWE Collective “Legal Playbook For Entrepreneurs”
- Presenter – June 5, 2025, Siouxland Community Professional Advisor Seminar, “Protecting Wealth: Asset Protection Planning as Part of Estate Planning”
- Presenter – June 5, 2025, Siouxland Community Professional Advisor Seminar, “Tax-Smart Giving: Strategic Philanthropy for the Practical Client”
- Presenter – October 30, 2024 55th Annual Sidney Kess Estate, Tax and Financial Planning Conference “Intersection of Tech and Estate Planning”
- Presenter – October 21, 2024, 2024 Tax & Estate Planning Forum “Buy Sell Agreements after Supreme Court decision in Connelly”
- Speaker – October 11, 2024 Nebraska State Bar Association “Incapacity Planning”
- Speaker – August 8, 2024 Nebraska Parkinson’s Association “Incapacity Planning as Part of Estate Planning”

Mary E. Vandenack Curriculum Vitae

- Speaker – March 19, 2024 Nebraska State Bar Association RPTE Section “Buy Sell Agreements Post-Connelly”
- Speaker – February 18, 2024 Omaha Estate Plan Council “Top Tips from Heckerling 2024”
- Speaker – June 27, 2024 – “Meet the Moment: A Woman’s Guide to Planning a Secure Future” – American Heart Association webinar with Tiffany T. House
- Speaker – May 1, 2024 – “Maximizing Wealth: The Importance of Coordinating Financial Assets with the Estate Plan” – NAIFA-FSP Webinar Series
- Speaker – April 20, 2024 – “Cybersecurity, Estate Planning, and Ethics” – Wealth Counsel Thought Leader Series
- Speaker – April 9, 2024 – “Estate Planning During Lifetime Part 1: Incapacity Planning with Vanesa L. Kanaga, Esq – InterActive Legal Academy Spring 2024.
- Speaker – March 19, 2024 – “Buy-Sell Agreements: The *Connelly* and *Blount* cases” – NSBA 2024 Estate Planning Seminar
- Speaker – February 16, 2024 – “Mary E. Vandenack: Heckerling Highlights from the 2024 Heckerling Institute on Estate Planning” – DUGGAN BERTSCH Chicago meeting
- Speaker – February 13, 2024 – “Mary E. Vandenack: Heckerling Highlights from the 2024 Heckerling Institute on Estate Planning” – Omaha Estate Planning Council event
- Speaker – February 6, 2024 – “Mary E. Vandenack, Joy Matak & Martin M. Shenkman: Notes from the 58th Heckerling Institute on Estate Planning Part 4 of 5” – LISI Webinar
- Speaker – January 30, 2024 – “Mary E. Vandenack, Joy Matak & Martin M. Shenkman: Notes from the 58th Heckerling Institute on Estate Planning, Part 3 of 5” – LISI Webinar
- Speaker – January 24, 2024 – “Mary E. Vandenack, Joy Matak & Martin M. Shenkman: Notes from the 58th Heckerling Institute on Estate Planning, Part 2 of 5” – LISI Webinar
- Speaker – January 22, 2024 – “Mary E. Vandenack, Joy Matak & Martin M. Shenkman: Notes from the 58th Heckerling Institute on Estate Planning, Part 1 of 5” – LISI Webinar
- Speaker – October 20, 2023 – “The Lawyer’s Ethical Duty to Recognize Cybersecurity Threats and How to Resolve Them: Including Consideration of IRS Publication 4557, Safeguarding Taxpayer Data” – Tax & Estate Planning Forum Webinar
- Speaker – October 17, 2023 – “Recent Developments in Estate Planning and Business Succession Planning: Structure Matters” – Financial Service Professionals Webinar
- Speaker – October 16, 2023 – “Ethics: How Technology Adds a New Layer” – Tax & Estate Planning Forum Webinar
- Speaker – June 29, 2023 – “Closely Held Business Buy-out Arrangements Should Be Reviewed Immediately in Light of Connelly” with Martin Shenkman and Jonathan Blattmachr – Shenkman Webinar
- Speaker - June 13, 2023 – “Estate Planning Nuggets” with Martin Shenkman for American Cancer Society.
- Speaker – March 30, 2023 – “Business Exit Planning – Trust Strategies” – LISI Webinar
- Speaker – March 16, 2023 – “Business Exit Planning – ESOPS” – LISI Webinar
- Speaker – March 2, 2023 – “Business Exit Planning - Charitable Strategies” – LISI Webinar
- Speaker – December 27, 2022 – “Review of the Proceedings from the 80th Annual NYU Federal Institute on Taxation” – [LISI Webinar](#)
- Speaker – November 8, 2022 – “Ethical Issues In Trusts and Estates Practice” – Wealth Counsel Thought Leaders Series

Mary E. Vandenack Curriculum Vitae

- Speaker – October 25, 2022 – “Technology, Innovation, Trusts, and Estates With Ethics – Building a Forward Thinking Ethically Compliant Client Service Oriented Life Balanced Law Firm” – The Digital Trust and Estate Forum
- Speaker – September 23, 2022 – “Mindfulness in the Modern World” – ABA RPTE Leadership Meeting
- Speaker – September 21, 2022 – “How to Give and Get the Most Out of Mentoring in Today’s Hybrid World” – ABA Women Rainmakers Webinar
- Speaker – August 5, 2022 – “Considerations from NYU Advanced Trusts and Estates Proceedings” – [LISI Webinar](#)
- Speaker – May 25, 2022 – “Enhancing Success with Healthy Boundaries” – Women of Legal Tech
- Speaker – May 18, 2022 – Interview by [DotCom Magazine](#)
- Speaker – April 29, 2022 – “Mindfulness” – ABA RPTE Spring Leadership Meeting, Dallas, Texas
- Speaker – April 22, 2022 – “Mary Vandenack and Abigail O’Connor’s Review of Proceedings of the 56th Heckerling Institute on Estate Planning” - [LISI Webinar](#)
- Speaker – January 20, 2022 – “Estate Planning, IRAs, & Trusts” – Society of FSP, Omaha Chapter
- Speaker – October 13, 2021 – “Future Implications from the 8th Circuit Court Holding in Strope-Robinson v. State Farm” – Nebraska State Bar Association annual meeting
- Speaker – June 21, 2021 – Mary Vandenack on [metroTV](#) – Interview by Andee Hoig, Publisher, metroMagazine
- Speaker – April 22, 2021 – “Managing Your Law Firm Through Change” – [the digital edge](#) podcast with Jim Calloway and Sharon Nelson
- Speaker – February 16, 2021 – “Mindfulness” – [metroTV](#) – Interview by Andee Hoig, Publisher, metroMagazine
- Speaker/Presenter – January 28, 2021 – “Third Party Trusts as Asset Protection Tools” - [WealthCounsel®](#)
- Speaker/Presenter – January 12, 2021 – “Best Technologies for Practice Development” – Trust & Estates Virtual Forum with Martin Shenkman
- Speaker/Presenter – October, 2020 – “Intersection of Estate Planning and Marital Planning” – [Nebraska State Bar Association](#) with Hannah Sommers
- Speaker/Presenter – September 30, 2020 – “8 Tech Traps and Tips Every Practitioner Must Know Now that You’ve Tackled Remote Working” – [Peak Trust Company & InterActive Legal Webinar](#) with Peter Fidler, Jonathan Blattmachr, and Martin Shenkman
- Speaker/Presenter – August 25, 2020 – “Best Practices for Preserving Client Intentions in Wealth Transfers” - [WealthCounsel®](#)
- Moderator – June 17, 2020 – “The New PPP Timeline and Other Issues for Reopening Businesses” Webinar for [Vandenack Weaver](#) ([recording continued](#))
- Moderator – May 15, 2020 – “Branding and Networking of Successful Women Attorneys: How did she do that?” – Webinar for 32nd Annual RPTE National CLE Conference
- Speaker/Presenter – May 14, 2020 – “Tech and Remote Work: More Practical and Actionable Tips You Can Take Now!” – [Peak Trust Company & InterActive Legal Webinar](#) with Jonathon Blattmachr, Martin Shenkman and Barron Henley
- Speaker/Presenter – April 27, 2020 – “Tech, Remote Work, and More: What Estate Planners Need to Know Now” – [Peak Trust Company & Interactive Legal Webinar](#) with Jonathon Blattmachr, Martin Shenkman and Barron Henley
- Moderator – April 2, 2020 – “Update on Cares Act and Paycheck Protection Loans” – Webinar for [Vandenack Weaver](#)
- Moderator – March 30, 2020 – “Navigating Business Responses to COVID-19 Legislation” – Webinar for [Vandenack Weaver](#)

Mary E. Vandenack Curriculum Vitae

- Moderator – March 24, 2020 – Avoiding Employment Litigation Webinar Series #4 – Harassment/#MeToo – Vandenack Weaver Webinar
- Speaker/Presenter- February 26, 2020- "A Straightforward Approach to a Path in Legal Technology for Women"- ABA Women Rainmakers presenting Women of Legal Tech Summit 2020
- Speaker/Presenter- February 21, 2020- "Rethinking Disposition of Trusts at Certain Ages: Approaches to Trust Design with an Asset Protection Focus" - Annual Creighton Law Review Symposium and Tepoel Lecture
- Moderator/Presenter – January 28, 2020 – “Ready for Process Automation? Start by Developing Checklists and Maps” - Best of ABA TECHSHOW Webinar
- Moderator - October 17, 2019 - Avoiding Employment Litigation webinar series
- Speaker - May 14, 2019 - "The Future of Estate Planning Practice" - Webinar for Purposeful Planning Institute
- Speaker/Presenter – May 3, 2019 – “50 Lessons for Women Lawyers” – New York State Bar Association
- Speaker/Presenter – April 16, 2019 – “Preserving Client Testamentary Intent” – Presentation at Omaha Estate Planning Council Breakfast Meeting
- Speaker/Presenter – March 28, 2019 – “Avoiding Erosion of Testamentary Intent via Contractual Designation” – Presentation at the Society of Financial Service Professionals March 2019 Breakfast Meeting
- Co-Presenter – March 7, 2019 – “Using Tech to Improve and Grow Your Estate Planning Practice – Part 2” – Webinar with Martin Shenkman
- Speaker/Presenter – February 28, 2019 – “Process Automation Phase One: Developing Checklists and Maps” – ABA Techshow 2019 Presentation
- Speaker/Presenter – February 28, 2019 – “Next Generation Technology for the Solo and Small Firm” – ABA Techshow 2019 Presentation
- Speaker/Presenter – February 27, 2019 – “Designing the Law Firm of the Future: Diversity, Inclusion, Technology, and Innovation” – Women of Legal Tech Presentation
- Presenter – January 29, 2019 – “Using Tech to Grow Your Estate Planning Practice” - Webinar
- Speaker/Presenter – December 2018 – “Profitable Alternative Fees for the Process Oriented Lawyer” - OBA End of the Year CLE Presented by OBA Lawyer Referral Service
- Speaker/Presenter – September 2018 – ABA Presentation “Future Proofing Your Law Firm”
- Presenter/Panelist – September 13, 2018 - ABA Webinar: CE1809SFP Affordable Technology for Solo and Small Firm Productivity
- Co-Speaker – July 10, 2018 – “Understanding What the 2017 Tax Reform Means to Your Firm” – Webinar for the Massachusetts Bar Association
- Speaker – ABA RPTE Symposium – May 2018 - “Moving? Can I Take It with Me? Can I Use Something New? State Law Exemptions Under the Microscope”
- Moderator – ABA RPTE COP Program – May 2018 – “Essential Lawyering Skills for Today”
- Speaker – ABA Webinar – April 2018 – “Understanding What Tax Reform Means For You – 199A”
- Speaker – Law Talk Network – April 2018 – “Technology for the Small and Solo Firm”
- Speaker – Creighton University School of Law Trusts & Estates Class – April 2018 – “Gun Trusts”
- Speaker – ABA Techshow 2018 – March 2018 – “Affordable Technology for the Solo and Small Firm”
- Speaker – ABA Techshow 2018 – March 2018 – “Alternative Fees for the Process Oriented Law Firm”
- Speaker – ABA Techshow 2018 – March 2018 – “Mindful Leadership for Innovation and Technology”
- Speaker – Lawpact Futures Conference – November 2017 – “The Future of Legal Services”
- Speaker – ABA RPTE Symposium – April 2017 – “Contract Based Wealth Transfers & Erosion of Testamentary Intent”
- Speaker – ABA Techshow 2017; “When Law Firms Merge”; “Panel Presentation: Future of Legal Services”; “Facilitator Trusts and Estates Community”; “Yoga for Technologists”; “Mindful Meditation”
- Speaker – “Alternative Fee Arrangements” for ABA RPTE Non-Tax Issues Committee Teleconference February 2017

Mary E. Vandenack Curriculum Vitae

- Speaker – “Analysis of the ABA Report on the Future of Legal Services” Podcast, Jim Calloway’s Law Practice Tips Blog October 2016
- Speaker – “Small Firms/Big Markets” Omaha Legal Professionals Association October 2016
- Speaker – “Implementing Alternative Billing in your Law Practice” Legal Talk Network, New Solo Podcast October 2016
- Speaker – “Small Firms/Big Markets” ISA and NSA Solo and Small Firm Conference August 2016
- Speaker – “Alternative Fees: Making Them Profitable” ISA and NSA Solo and Small Firm Conference August 2016
- Speaker – “Small Firms/Big Markets” ABA Techshow, March 2016
- Speaker – “How to Compete with IBM Watson JD: Future-proof your practice by improving efficiency now – Part 1” ABA Law Practice January 2016
- Speaker – “Business Succession Planning – Omaha Network January 2016
- Speaker – “Technology in Law Practice: The Good, the Bad, and the Ugly” Omaha Bar Assn Dec 2015
- Speaker – “Estate Planning for Farmers” Hertz Management November 2015
- Speaker – Future of Legal Services Panel, ABA Law Practice Spring Meeting June 2015
- Speaker – “How to Have a Full Plate in Life without dropping anything off” College of Saint Mary Honor Student Program January 2015
- Speaker – “Legal Issues for Businesses,” Midlands National Management Association, May 2008
- Speaker – “Medical Records Guide,” Medical Group Presentations, 2008
- Speaker – “Charitable Giving Considerations,” Charitable Organization Presentations, 2005
- Speaker – “Estate Planning Guide,” – Medical Group Presentations, 2005
- Speaker - “Retirement Plan Design Considerations,” Firm Seminar, 2004
- Speaker - “Estate Planning for Farm Assets,” Hertz Farm Management, Fall 2003
- Speaker – “HIPAA Basics,” Medical Group Presentations, 2003
- Speaker - “Estate Planning Considerations,” Saint Stephen the Martyr Catholic Church, Spring 2003
- Speaker - “Estate Planning In Changing Times,” Archdiocese of Omaha, Fall 2002
- Speaker - “Charitable Giving Strategies,” Wahoo Neumann Schools, Fall 2001

Legal Publications

- Law of the State in Which a Trust is Formed Remains Relevant in Situs Changes and Decantings! – Mary Vandenack and Paul Hood, January 29 2025 Leimberg Estate Planning E-Newsletter
- Mary Vandenack’s Notes from the Notre Dame® Tax & Estate Planning Institute – Part 1 - ary Vandenack – LISI Estate Planning E-Newsletter – September 25-27, 2024
- “Top Tax and Asset Protection Planning Issues to Consider in 2024 Planning,” Physicians Bulletin, March/April 2024
- “Mary E. Vandenack, Joy Matak & Martin M. Shenkman: Notes from the 58th Heckerling Institute on Estate Planning Part 4 of 5” – February 6, 2024
- “Mary E. Vandenack, Joy Matak & Martin M. Shenkman: Notes from the 58th Heckerling Institute on Estate Planning, Part 3 of 5” – January 30, 2024
- “Mary E. Vandenack, Joy Matak & Martin M. Shenkman: Notes from the 58th Heckerling Institute on Estate Planning, Part 2 of 5” – January 24, 2024
- “Mary E. Vandenack, Joy Matak & Martin M. Shenkman: Notes from the 58th Heckerling Institute on Estate Planning, Part 1 of 5” – January 22, 2024
- “Mary E. Vandenack, Joy Matak, Martin Shenkman – 58th Annual Heckerling Institute Meeting Notes” – January 2024
- “Trusts for Entrepreneurs” – Mary E. Vandenack – [metroMAGAZINE](#), Winter 2023/2024
- “Family Office – Tax Strategies for Investment Expense” – Mary Vandenack – LISI Estate Planning E-Newsletter #3073 – October 11, 2023
- “Mary Vandenack’s Notes from the 49th Annual Notre Dame Tax & Estate Planning Institute” – LISI Estate Planning E-Newsletter #3068 – September 25, 2023

Mary E. Vandenack Curriculum Vitae

- "Family Offices" – Mary Vandenack - LSI Estate Planning E-Newsletter #3066 – September 19, 2023
- "Perspectives: The Financial Aspect of the Practice of Law" – ABA Law Practice Magazine – September 1, 2023
- "Elevate the Client Experience" – Mary E. Vandenack - [ABA Law Practice Magazine](#) – July/August 2023
- "The Connelly Case" – Mary E. Vandenack - LSI Business Entities E-Newsletter #274 – June 12, 2023
- "Estate Planning with Retirement Accounts After Secure Act 2.0" – Mary E. Vandenack – [Physician's Bulletin](#) - March/April 2023
- "Trust Strategies for the Business Exit" – LSI Business Entities E-Newsletter #271 – VWT Website – March 17, 2023
- "Using ESOPs as a Business Exit Strategy" – LSI Business Entities E-Newsletter #269 – VWT Website – March 10, 2023
- "Charitable Strategies for the Business Exit" - LSI Business Entities E-Newsletter #268 – VWT website – February 24, 2023
- "Rewarding Leaders" - Mary E. Vandenack – [ABA Law Practice](#) -November/December 2022
- "Mary Vandenack's Notes from the 2022 81st Annual NYU Institute on Federal Taxation Conference" – LSI Estate Planning Newsletter #2998 – [VWT website](#) – November 29, 2022
- "Ethics, Technology, and Innovation in Law Practice" – Mary E. Vandenack – [Nebraska Lawyer Magazine](#) – September/October 2022
- "Culture Matters: Finding a Legal Culture Consistent with Your Values" – Mary E. Vandenack – [ABA Probate & Property](#) – September/October 2022
- "When to use Coaching, When to use a Psychologist – Some Tips on Finding the Right Fit" – Mary E. Vandenack – [ABA Probate & Property](#) – September/October 2022
- "Mary Vandenack's Notes from the 2022 NYU Advanced Trusts and Estates Conference" – [LSI Estate Planning Newsletter #2975](#) – July 27, 2022
- "Mental Health Law" – Mary E. Vandenack, [metroMAGAZINE](#), July 11, 2022
- "Design a Flourishing Law Firm" – Mary E. Vandenack – [Law Practice Magazine](#) – July/August 2022
- "My Life Is My Artwork: Create a Practice That is Part of the Artwork" – Mary E. Vandenack – [ABA Probate & Property](#) – July/August 2022
- "Mary Vandenack's Notes from the NYU 14th Annual Tax Controversy Forum" – [LSI Income Tax Planning Newsletter #222](#) – June 29, 2022
- "Modern Mindfulness: Being Mindful Doesn't Mean I am Always Zen" – Mary E. Vandenack – [ABA Probate & Property](#) – May/June 2022
- "Mary Vandenack: Transcript from Legal Visionaries Podcast on Business and Tax Considerations Before Selling a Business" – Mary E. Vandenack, [LSI Business Entities Newsletter #250](#), May 2, 2022
- "Mary E. Vandenack, Abigail O'Connor & Martin Shenkman: 56th Annual Heckerling Institute Meeting Notes" – [LSI Estate Planning Newsletter #2953](#), April 18, 2022
- "Call it a Life Plan" – Mary E. Vandenack, [metroMAGAZINE](#), April 13, 2022
- "Deliberate Wellness – The Resilient Lawyer" Mary E. Vandenack – [ABA Probate & Property](#) – March/April 2022
- "The Matter of the Estate of Skip Beach" – Mary E. Vandenack – [LSI Estate Planning Newsletter #2937](#), February 10, 2022
- "Advancing Trusts and Estates Practices with Technology and Innovation: Become a Digital Innovation Specialist" – Mary E. Vandenack, [WealthCounsel Quarterly](#), Fall 2021
- "Mary Vandenack's Notes from the NYU Institute on Federal Taxation" – Mary E. Vandenack, [LSI Estate Planning Newsletter #2923](#), November 29, 2021.
- "Making it Rain: Mary Vandenack" – Sharon Nelson interviewed Mary E. Vandenack, [Law Practice Today](#), September 14, 2021
- "Mary Vandenack's Notes from the NYU Advanced Trusts and Estates Conference" – Mary E. Vandenack, [LSI Estate Planning Newsletter #2897](#), August 2, 2021
- "Leaving a Big Law Firm to Start Your Own" – Mary E. Vandenack, [Law Practice Today](#), July 14, 2021

Mary E. Vandenack Curriculum Vitae

- "Evolving Law Firm Models with Innovation: Using Lessons Learned from the Pandemic" - Mary E. Vandenack, [Law Practice Magazine](#), July/August 2021
- "Notes on the 55th Annual Heckerling Institute on Estate Planning " - Mary E. Vandenack, [LISI Estate Planning Newsletter #2889](#), June 14, 2021
- "Great People to Have on Your Side" – Mary E. Vandenack, [metroMagazine](#), The Women's Issue, June 8, 2021
- "Insurance Issue with Transfer on Death Deeds" – Mary E. Vandenack, [metroMagazine](#), The Women's Issue, June 8, 2021
- "Mary Vandenack on Dawn Strobe-Robinson v. State Farm Fire and Casualty: Insurance Risk for Transfer on Death Deeds" - Mary E. Vandenack, [LISI Estate Planning Newsletter #2871](#), March 17, 2021
- "Mary Vandenack on In re Trust of McGregor: Nebraska Supreme Court Finds Nonjudicial Settlement Agreement Violated Material Purpose of Trust Because It Ignored the Trust's Spendthrift Provision" – Mary E. Vandenack, [LISI Estate Planning Newsletter #2868](#), March 11, 2021
- "Mary E. Vandenack: The Evolution of Innovation, Technology and Estate Planning: Moving Toward a Concierge Practice" – Mary E. Vandenack, [LISI Estate Planning Newsletter #2867](#), March 2, 2021
- "Using Your Federal Estate Tax Exemption and Allowing Spousal Access (The SLAT)", [Vandenack Weaver LLC](#)
- "Mary Vandenack on In re Estate of Michael R. Brinkman" – Mary E. Vandenack, [LISI Estate Planning Email Newsletter #2862](#), February 11, 2021
- "Strategies for a Possible Reduced Estate Tax Exemption" – Mary E. Vandenack and Michael J. Weaver, [metroMagazine](#), February 3, 2021
- "Next Generation Tech for Estate-Planning Lawyers - Employ lessons learned from going remote to make permanent changes" – Mary E. Vandenack & Martin M. Shenkman - [Trusts and Estates](#), February 2021
- "In The Office, Out of the office, Remote Challenges Outside, Safety Inside" – [Law Practice Magazine](#), January/February 2021
- "Learning How to Lead Differently in Times of Crisis" – Mary E. Vandenack, [Law Practice Magazine](#), November/December 2020
- "Mary Vandenack's Notes from the NYU Advanced Trusts and Estates Conference" – Mary E. Vandenack, [LISI Estate Planning Email Newsletter #2836](#), November 12, 2020
- "Mary Vandenack on Lee v. Argent Trust Company" – Mary E. Vandenack, [LISI Employee Benefits and Retirement Planning Email Newsletter #747](#), September 2020
- "The Tax Planning Checklist for Law Firms" – Mary E. Vandenack, [Law Practice Magazine](#), Sept/Oct 2020
- "Improve and Automate Financial Information" – Mary E. Vandenack, [Law Practice Magazine](#), Sept/Oct 2020
- "Rethinking Disposition Provisions of Trusts: Recent Trends and Approaches to Trust Design with an Asset Protection Focus" – Mary E. Vandenack, [Creighton Law Review](#), August 31, 2020
- "Estate Planning Issues in Divorce and Premarital Planning" – Mary E. Vandenack, [metroMAGAZINE](#), August/September 2020
- "Driving Innovation and Change in the Legal Industry" – Mary E. Vandenack, [Law Practice Magazine](#), July/August 2020
- "Congress Adds Flexibility for PPP Borrowers" – Mary E. Vandenack, co-author Michael Weaver, [metroMAGAZINE](#), June/July 2020
- "Mary Vandenack's Notes from the NYU Federal Real Estate and Partnership Tax Conference" – LISI Income Tax Planning Newsletter #197, July 3, 2020 at <http://www.Leimbergservices.com>
- "How I am Changing My Practice, Client Meetings, Client Planning, and More to Address the Coronavirus" – Jonathan Blattmachr, Barron Henley, Thomas Tietz, Martin Shenkman, & Mary Vandenack – [ABA Section of Real Property, Trust and Estate Law](#)
- "Managing the Remote Law Practice Magazine" - Mary E. Vandenack, Martin Shenkman, & Jonathan Blattmachr - [NAEPC Journal of Estate and Tax Planning](#), May 2020

Mary E. Vandenack Curriculum Vitae

- "The Slow Return to the New Normal and Different Approaches to Signing/Executing Estate Planning Documents" Mary E. Vandenack, Martin M. Shenkman, Jonathan Blattmachr, Andrew Wolfe, and Thomas A. Tietz, [LISI Estate Planning Newsletter #2794](#), May 11, 2020
- "Law Firm Leadership and Management" – [Law Practice Magazine](#), May/June 2020
- "Business Continuity; Recovering From Covid-19" – Mary E. Vandenack, co-author Michael Weaver, [metroMAGAZINE](#), April 2020
- "What Has Covid-19 Taught Us About Resilience?" – Mary E. Vandenack, [metroMAGAZINE](#), April 2020
- "Managing the Remote Law Practice and Other Practical Administrative Considerations during Coronavirus" - Mary E. Vandenack, Martin Shenkman & Jonathan Blattmachr, [LISI Estate Planning Newsletter #2789](#), April 17, 2020
- "Retirement Plan Provisions of the CARES Act" – Mary E. Vandenack, [Retirement Daily](#), April 6, 2020
- "Retirement Plan Provisions of the CARES Act" – Mary E. Vandenack, [LISI Employee Benefits & Retirement Planning Email Newsletter #728](#), March 27, 2020
- "Taking Your Estate Planning Practice Remote in Short Order" – Mary E. Vandenack, [LISI Estate Planning Email Newsletter #2786](#), March 25, 2020
- "Families First Coronavirus Response Act – Provisions Expanding Requirements for Businesses to Provide Paid Emergency Leave" – Mary E. Vandenack & James S. Pieper, [LISI Employee Benefits & Retirement Planning Email Newsletter #726](#), March 23, 2020
- "Foundational Estate Planning Priorities in the Face of COVID-19" – Mary E. Vandenack, [LISI Estate Planning Newsletter #2784](#), March 18, 2020
- "Finding a Personalized Marketing Plan" – Mary E. Vandenack, [Law Practice Magazine](#), March/April 2020
- "When a Trademark Owner is Entitled to the Profits of a Competitor" - Mary E. Vandenack, [metroMAGAZINE](#), February 2020
- "How Long Do You Have to Keep Old Wills" – Mary E. Vandenack, [LISI Newsletter #2778](#): New York State Bar Association Committee on Professional Ethics Opinion 1182 February 2020
- "Remembering Copy Editor, John Fallahay" - Mary E. Vandenack, [Law Practice Magazine](#), January/February 2020
- "Planning to Sell a Closely Held Business" - Mary E. Vandenack, [metroMAGAZINE](#), December 2019
- "Planning: Life, Estate, Asset Protection, Business, Transition" - Mary E. Vandenack, [metroMAGAZINE](#), October 2019
- "Mary Vandenack on Revenue Ruling 2019-19: Uncashed Retirement Plan Distribution Checks" - [LISI Employee Benefits and Retirement Planning Newsletter #709](#), September 12, 2019
- Commentary on the 11th Annual NYU Tax Controversy Forum - Mary E. Vandenack, [LISI Income Tax Planning Newsletter #182](#), July 18, 2019
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- "Update: Mindfulness Revisited," Nov/Dec/Jan 2017 [metroQUARTERLY](#)
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Legal Visionaries Podcasts

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- Estate Planning for Agricultural Clients – Guests: Bryan Holen and Monte Schatz – October 26, 2021
- Trust Strategies for the Business Exit – Guest: Mike Weaver – November 9, 2021
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- Cybersecurity – Guest: Ben Schorr – November 23, 2021
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- Wellbeing Tips for Lawyers – Guest: Heidi Alexander – December 21, 2021
- Legacy Aspect of Business Exits – Guests: Rob Wellendorf and Mike Weaver – December 28, 2021
- Importance of Law Firm Culture for Wellbeing – Guest: Pam Hernandez – January 4, 2022
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- Life Care Planning Model – Guest: Rachel Truhlsen – February 15, 2022
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- Five Behaviors of An Effective Team – Guest: Cheryl Kuhn – April 11, 2022
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- Then and Now – Divorce and Estate Planning – Guest: Sharon Klein – July 26, 2022
- Maximizing Client Relationships to Grow Practice – Guest: Carol Shiro Greenwald, PhD – August 2, 2022
- Taxation of Aircraft – Host: Rachel Truhlsen; Guest: Mary Vandenack - August 9, 2022
- Common Estate Planning Strategies for Physicians – Guest: Stacie Neussendorfer – August 23, 2022

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- Legal Issues Related to Aging – For Everyone – Guest: Rachel Truhlsen – September 6, 2022
- Intersection of Marital Law and Estate Planning – Guest: Sharon Klein September 20, 2022
- Law Firm CFO Expectations – Guest: Terrell Turner – September 27, 2022
- Private Family Trust Companies – Host: Rachel Truhlsen; Guest: Mary Vandenack - August 9, 2022
- Leadership: Upgrade Your Operating System – Guest: Anne Collier - October 11, 2022
- How to Find a Buyer for Your Business – Guest: Ken Hachikian – October 18, 2022
- Fiduciary Issues in Estate Planning – Guest: Ross Polking – October 25, 2022
- Asset Protection for Accumulated Wealth – Host: Rachel Truhlsen; Guest: Mary Vandenack – November 1, 2022
- “I’m Not my Father: Taking on the Family Business.” – Guest: Andrea Hoig – November 8, 2022
- Family Office - Host: Cheri Duryea; Guest: Mary Vandenack – November 15, 2022
- Supercharge Your Culture – Guest: Anne Collier – November 22, 2022
- Diversity and Wellness - Guest: Denise Robinson – November 29, 2022
- Estate Tax Planning after the 2022 Elections – Guests: Jonathan Blattmacher and Martin Shenkman – December 5, 2022
- Premium Financing – Guest: Darin Duin – December 13, 2022
- Key Things Law Firms Can Do to Grow Profits – Guest: Terrell Turner – December 20, 2022
- Ethical Rules Need to Change – Guest: Dan Siegel – December 27, 2022
- Integrative Healthcare for Wellbeing – Guest: Dr. Jaime Dodge – January 3, 2023
- Business Prenups – Guest: David Campbell – January 10, 2023
- Productivity-Guest: Daniel Siegel - January 17, 2023
- Integrated Care-Guests: Rachel Truhlsen, Sue Leppert, Janice Fitchhorn -January 24, 2023
- Nevada Private Trust Companies – Guest: Daniel Gerety & David Holmes -January 31, 2023
- Data and Communications Security – Guest: Dan Siegel – February 7, 2023
- Save a Dollar, Cost a Fortune – Guest: David Campbell – February 14, 2023
- Becoming a Real Estate Developer with Qualified Opportunity Zones – Guests: Jim Pieper and Kim Kuhle – February 21, 2023
- Qualified Opportunity Zone Funding – Guests: Jim Pieper and Kim Kuhle – February 28, 2023
- What’s Your Legacy? – Guest: Crystal Patterson – March 7, 2023
- Life Insurance in Estate Planning – Guest: Eryka Morehead – March 14, 2023
- Equality in the Practice of Law – Guest: Gretchen McGill – March 21, 2023
- Family Office: Tax Strategies for Investment Expense – Guest: Daniel Gerety & David Holmes– March 28, 2023
- The Basics of Partnership Tax – Guest: Michael Weaver – April 4, 2023
- Long-Term Care Insurance – Guest: Eryka Morehead – April 11, 2023
- Partnering With Your Assistant – Guest: Crystal Patterson – April 18, 2023
- Sports Analogies, Part 2 – Guest: Ross Polking – April 25, 2023
- An Essential Life Skill: Asking for Help – Guest: Chris Aupperle – May 2, 2023
- Secure 2.0 – Guest: Stacie Neussendorfer – May 9, 2023
- Setting Boundaries – Guest: Chris Aupperle – May 16, 2023
- Preferred Freeze Partnerships Part 1 – Guests: Jerry Hesch and Stephen Breitstone – May 23, 2023
- Humanness of Anxiety – Guest: Lisa Woodford – May 30, 2023

Mary E. Vandenack Curriculum Vitae

- Preferred Freeze Partnerships Part 2 – Guests: Jerry Hesch and Stephen Breitstone – June 5, 2023
- Strategies for Reducing Self-Doubt – Guest: Lisa Woodford – June 13, 2023
- Split Dollar Strategies for Life Insurance – Guest: Eryka Morehead – June 20, 2023
- My 5K Journey – Moving for Health at Any Size or Fitness Level – Guest: Andrea “Andee” Hoig – June 27, 2023
- Longevity -Retirement Income – Guest: Jack McKeegan – July 4, 2023
- Leadership – An Analogy with Training Horses – Guest: Anne Collier – July 11, 2023
- Estate Planning Lessons from the Levine Case – Guest: Eryka Morehead - July 18, 2023
- Every Life Is Worth Fighting For - Mental Health for Seniors – Guest: Amanda Koplin – July 25, 2023
- Creative Uses of Non-Grantor Trusts – Guest: Joy Matak – August 1, 2023
- Long-Term Care Planning – Guest: Darrin Brumbaugh – August 8, 2023
- Alaska Trusts – Guest: Abigail O’Connor – August 15, 2023
- Personal Branding for Lawyers – Guest: Katy Goshtasbi – August 22, 2023
- Income Tax Considerations for Estate Planning, Part 1 – Guest: Abbie Everist – August 29, 2023
- Preserving Dignity in Estate Planning – Guest: Amanda Koplin – September 5, 2023
- Income Tax Considerations for Estate Planning, Part 2 – Guest: Abbie Everist – September 12, 2023
- Building a Business from a Creative Idea – Guest: Hannah Arington – September 19, 2023
- Client Focused Estate Planning: Meeting Objectives – Guest: Anne Burnett – September 26, 2023
- Key Financial Metrics for Law Firms – Guest: Britt Lorish – October 3, 2023
- Exploring the Evolution of Buy/Sell Agreements – Guest: Mary Vandenack – October 10, 2023
- Automation and AI Opportunities for Estate Planners – Guest: Deirdre Wheatley-Liss – October 17, 2023
- Mastering the Art of Philanthropy: Trends and Strategies – Guest: Kim Cappellano – October 24, 2023
- Navigating Valuation Pitfalls: Insights from the Experts – Guests: Evan Levine and Nainesh Shah – October 31, 2023
- Intersection of ESOPs and Estate Planning – Optimizing After Tax Outcomes – Guest: Kenneth Alter – November 7, 2023
- If I Had Known About Money Then: Wisdom That Would Have Saved \$1,000,000 – Guest: Mitchell Hockenbury – November 14, 2023
- Navigating Business Transitions: A Comprehensive Guide to Business Continuity Planning – Guest: Abby Arcishevsky – November 21, 2023
- Transforming Your Practice: The Client-Centric Journey – Guest: Deirdre Wheatley-Liss – November 28, 2023
- Preserving Prosperity: Mastering Multi-Generational Wealth Transfers – Guest: Zac Ritchey – December 5, 2023
- Professional Wills – Guest: Mary Vandenack – December 12, 2023
- Strategic Conversations: Tactical Influence in Leadership and Communication – Guest: Mitchell Hockenbury – December 19, 2023
- Decoding Qualified Charitable Distributions – Guest: Mike Weaver – December 26, 2023
- Strategic Tax Planning Unwrapped: Exploring Tax-Exempt Trusts – Guest: David Murray – January 3, 2024
- Capitalizing Care: Exploring the Surge of Private Equity in Healthcare – Guest: Tracey Salinski – January 9, 2024
- Consider a Business Owner Trust for your Sale – Guest: David Murray – January 16, 2024

Mary E. Vandenack Curriculum Vitae

- Legacy Blueprint: Navigating the Path to Family Financial Preservation – Guest: Zac Ritchey – January 23, 2024
- Strategies for Valuing Complex and Unusual Entities – Guests: Evan Levine and Nainesh Shah – January 30, 2024
- Diversifying a Concentrated Position – Guest: Vincent Thomas – February 6, 2024
- Stock Diversification Trusts – Guest: David Murray – February 13, 2024
- Valuation Insights: Navigating Estate Planning with Precision – Guests: Alyssa Quinlan and Molly Gron – February 20, 2024
- Alternatives to 1031's – Real Estate Shelter Trust – Guest: David Murray – February 27, 2024
- Converting "Loud" Trusts and Key Insights on "Silence" – Guest: Ross Polking – March 5, 2024

Editorial Roles

- Law Practice Magazine
 - Editor-in-Chief, 2018 - 2020
 - Features Editor, 2013-2016
 - Assistant Features Editor, 2012-2013
 - Editorial Board, 2011-2019
- Nebraska Lawyer - Issue Editor, various times
- Creighton Law Review - Editor in Chief, 1992

Community Associations, Board Service

- MWE Collective – 2025 to present
- Entrepreneurs Organization 2023-2024
- Nationwide Gift Planning Advisory Council for American Cancer Society– 2022 to present
- Women Investing in Nebraska 2020 to present
- Boystown Advisory Board, March 2017-2022
- Boystown Boosters, 2022 - 2025
- Wellbeing Partners – TPC Committee 2021 to 2023
- Creighton University Law School Advisory Board, May 2017 to present
- TABS Board, 2012 to 2023
- American Heart Association
 - Circle of Red, 2011-present – Executive Distinction
 - Executive Committee, Go Red For Women, 2012-2014
- SAC Federal Credit Union
 - Supervisory Committee and Budget Committee, March 2017-May 2018
- Omaha Chamber of Commerce
 - BOSS Group
 - Health Care Council
- Omaha Network, 2011-2020
- Hope Lodge Mission Advancement Council, 2011–2017
- Nebraska Cancer Coalition Board of Directors, 2010–2016
- Armbrust YMCA
 - Board of Directors, 2008–2012
 - Chair, Strong Kids Campaign, 2008
- Wellbound Fitness Advisory Board, 2004-2006
- New Cassel Retirement Center Finance Committee, 2002-2004
- Saint Stephen the Martyr
 - Development Campaign Leader, 2002

- Finance Board, 1994-2004
- American Council on Exercise, 2000-2020
- Yoga Alliance – 300 hour RYTE, 2008-present
- Jaybackers, 1993-present
- Millard Business Association, 2005-2017
- Omaha Women's Fund
- Former Member Rotary International, Suburban Chapter

Professional Associations, Memberships, and Activities

- American College of Trust and Estate Council 2020 to present
 - Nebraska State Chair – 2023 to present
 - Asset Protection Committee
 - Technology in the Practice Committee
 - Artificial Intelligence Task Force
- American Bar Association
 - ABA Task Force on Cybersecurity 2024 to present
 - ABA SCOTIS 2018 – present
 - ABA House of Delegates 2024-2025
 - ABA Commission on the Future of Law Practice 2014 – 2016
 - ABA Commission on Youth at Risk, 2013-2016
 - American Bar Association Foundation – Fellow, 2014 to present
 - ABA Law Practice Division
 - Law Practice Division Council 2014 to 2019
 - Law Practice Chair 2023-2024
 - Law Practice Vice Chair 2022-2023
 - *Law Practice Magazine* Senior Editorial Board –2011 to 2021
 - Vice Chair 2013-2014
 - Chair 2018 to 2020
 - Women Rainmakers –2011-2024
 - Author – Law Practice Magazine Leadership Column – 2016 to 2018
 - Evolving Business Models Task Force, 2014-2015
 - Resolutions Committee – Vice Chair, 2014-2015
 - Futures Initiative – Vice Chair 2015-16
 - ABA Real Property Trusts & Estates Section
 - Probate & Property Career and Wellness Column – 2021 to 2023
 - Council – 2020 to 2024
 - Liaison: ABA Entities – 2019 to present
 - Joint Law Practice Management Group – Group Co-Chair 2018-2020
 - Futures Task Force - Co-Chair 2016-2019
 - ABA RPTE Small Firms Committee - Vice Chair, 2015-2019
 - ABA RTPE Economics of Practice & Technology – Chair 2016-2019
 - Planning Committee – 2017 to 2023
 - Asset Protection Planning Committee – Vice Chair 2018
 - Trust and Estate Division Assistant Secretary 2019-2020
 - ABA Sections on Taxation, Business Law, International Law, Health Care Law
- Nebraska State Bar Association
 - Legislative Committee 2020 to present
 - Foundation Fellow, 2015; Lifetime Fellow 2021
 - Member of Sections on Real Property, Trust and Probate Law, and Business Law
 - Past Service to Lawyers' Assistance Implementation Committee; Publications Committee; Women and the Law Section; Officer of Business Law Section
- Michigan Bar Association

Mary E. Vandenack Curriculum Vitae

- American Professional Responsibility Lawyers
- Omaha Estate Planning Council
- Omaha Bar Association
 - Medical/Legal Committee, 2004-2005
 - Domestic Violence Committee, 2003-2005
- American Health Lawyers Association
- Medical Group Management
- Scribes: The American Society of Legal Writers
- Health Care Compliance Association
- Chair, Nebraska Women's Bar Association, 2002
- Alpha Sigma Nu Jesuit Honor Society
- Phi Delta Phi Legal Fraternity
- Uniform Law Commission Observer

Bar Admissions/Courts

- New York, 2025
- Nebraska, 1992
- U. S. District Court, District of Nebraska, 1992
- Michigan, 2007
- U.S. Court of Appeals, Seventh Circuit, 2016
- U.S. Court of Appeals, Eighth Circuit, 2016
- U.S. Tax Court, 2016

Honors and Features

- Recognized by Best Lawyers Multiple Times
- Recognized by Super Lawyers Multiple Times
- Martindale-Hubbell Preeminent – Peer Rated for Highest Level of Professional Excellence 2020-2024
- “Women in Business” – Midlands Business Journal – November 22, 2022
- Nebraska State Bar Association Lifetime Fellow 2022
- [Marquis Who's Who Biographical Registry](#), February 22, 2022
- “Women Who Rock” – Midlands Business Journal - October 8, 2021
- Selected for recognition in the 2019 25th Edition of *The Best Lawyers in America*® for work in Trusts and Estates.
- Chartered Advisor in Philanthropy®, February 2019
- Identified as a resource for The Well-Being Toolkit for Lawyers & Legal Employers, which released in July 2018.
- The Best Lawyers in America– Omaha Magazine, March/April 2018
- [2018 AIOLC's 10 Best in Nebraska for Client Satisfaction](#), The Estate Planning Division – The American Institute of Legal Counsel, December 2018
- ABA [LTRC Distinguished Women of Legal Tech](#) 2018
- SmallLaw's Pick of the Week Award for the article, “[The Impact of Tax Reform On Law Firms](#)”, July 2018
- College of Law Practice Management – Inducted 2017
- Lawyers of Executive Distinction – Trusts & Estates – Lawyers of Distinction, June 2017
- Lawyers of Executive Distinction – Taxation – Lawyers of Distinction, June 2017
- Very Inspirational People, *metroMAGAZINE*, Summer 2017
- 2017 Top Rated Lawyers, *National Law Journal*, March 2017
- 2017 Women Leaders in the Law, *Corporate Counsel Magazine*, March 2017
- American Bar Foundation Lifetime Fellow 2016
- Nebraska Cancer Coalition Partnership Award 2016
- Featured in Fortune Magazine “Women in Law,” *Fortune Magazine* , September 15, 2015

Mary E. Vandenack Curriculum Vitae

- James Keane Memorial Award March 2015 presented by American Bar Association Law Practice Division for innovation in technology in the practice of law
- Featured in: "You Know What They Say: If You Want Something Done, Ask a Busy Person," Interview with Omaha Daily Record, September 5, 2014
- Best Dressed, Strictly Business Magazine, 2008