

## JEFFREY BARNES KOLB

**Occupation:** Lawyer

**Business:** Kolb Roellgen & Traylor LLP  
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**Born:** May 28, 1951; Ft. Geo. Meade, Md.

**Married:** June 2, 1973; Deborah Lynn Nosko

**Children:** Justin Barnes Kolb  
Joanna Montgomery (Kolb) Rutigliano  
John Adam Kolb

**Educated:** Indiana University, Bloomington  
B.A. 1973  
J.D. 1976

### Legal Memberships:

Indiana State Bar Association, 1976-present  
Board of Managers, 1990-1992  
Unauthorized Practice of Law Committee, 2000-2010  
Chair, 2004-2008  
Internet and Electronic Commerce Committee, 1999-2006  
Probate Trust & Real Property Section, 1976-present  
Chair, 1986-1987  
Editor, Newsletter, 1981-2022  
Council, 1979-present  
Probate Review Committee Chair, 1996-2022  
Lifetime Service Award, 2004

Indiana Bar Foundation, 1976-present  
Fellows, 1988-present  
Board of Directors, 1992-2004  
State Pro Bono Commission, 1999-2000  
President, 2000-2002

Indiana Continuing Legal Education Forum  
Board of Directors, 1997-2004

Illinois State Bar Association, 1977-present  
Estate Planning Section, 1977-present  
Real Property Section, 1977-present

American Bar Association, 1976-present  
Real Property, Probate & Trust Section, 1976-present  
General Practice Section, 1990-1996  
Vice-Chair Estate Section, 1990-1992

Knox County Bar Association, 1976-present  
President, 1982

American College of Trust and Estates Counsel,  
1988-present

National Academy of Elder Law Attorneys, 1990-present

Volunteer Lawyer Program of Southwestern Indiana, Inc. (District 13 Pro Bono  
Commission) 1999-present  
Board of Directors, 1999-present

Probate Code Study Commission, State of Indiana,  
1980-1982; 2019 to present.

Board Certified Indiana Trust and Estate Lawyer (formerly “Certified Estate  
Planning and Administration Specialist” 2006 to present): Trust and Estate Specialty  
Board (formerly “Estate Planning and Administration Specialty Certification  
Board”).  
Certified 2006-present  
Co-chair 2008-2010

### **Legal Writings:**

Computer

Software: Indiana Estate Planning System, ICLEF, 2000 (discontinued).

Books:

Henry’s Indiana Probate Law and Practice,  
Vol. 8, LexisNexis, 2005 and chapter 41, “Indiana Death Taxes” 2013.(retired 2021)

Indiana Tax and Administration System for Trusts and Estates of Decedents,  
ICLEF, 1981.

Indiana Guardianship System, ICLEF, 1988.

“Payment of Estate Taxes,” Estate Planning Handbook, Dow Publishing, 1988.

Sec. 2032A; Special Valuation for Farm and Business Real Property,  
R&R Newkirk, 1981 (discontinued).

Asset Protection – Indiana Legacy Trust chapter; ABA publishing 2022

Articles:

“Material Participation under IRC Sec. 2032A,”  
Res Gestae, May (Part I) and June (Part II), 1980.

“Indiana Tax and Administration System for Trusts and Estates  
of Decedents,” ICLEF, 1981.

“Indiana Probate Practice,” ICLEF’s Mexico Institute, 1983.

“Indiana Death Taxes,” Probate Procedures, ICLEF, 1984.

“Special Use of Valuation and the Marital Deduction,”  
Journal of Agricultural Taxation & Law; Warren, Gorham &  
Lamont, Inc., 1984.

“Farm Leases and Sections 1401, 6166 and 2032A,”  
Advising the Farmer as a Client, ICLEF, 1985.

“Indiana’s Living Wills and Life Prolonging Procedure Act,”  
Indiana Law Review, Vol. 19, No. 1, 1986.

“Multistate Problems with Living Wills and Durable  
Health Care Powers of Attorney” Right to Die a Natural  
Death, ICLEF, 1986.

“How to Streamline the Administration Process,”  
Estate Administration, ICLEF, 1987.

“Indiana’s Health Care Consent Law,” Res Gestae,  
August 1987.

“Surviving Spouse’s Forced Share in Indiana,”  
Current Developments Affecting Indiana  
Practitioners, ICLEF, 1988.

“Legislation Related to UTMA, the Uniform Transfers to  
Minors Act, Disclaimers and Development Connected  
To Powers of Attorney,” Estate and Guardianship  
Administration, ICLEF, 1989.

“Ethical Considerations,” The Elderly Client Issues and

Answers, ICLEF, 1990.

“Indiana Power of Attorney Act,” Legislative Update, ICLEF, 1991; Elder Law, ICLEF 1991; Estate and Business Planning Institute, Evansville Bar Association, 1991; Res Gestae, August (Part I) and October (Part II), 1991; Legal Issues for Incapacitated Person Guardianships and Alternatives, ICLEF, 1992; Indiana Law Review, Vol. 25, No. 4, 1992; Estate Planning and Administration, ICLEF, 1992; (different versions).

“In the Beginning: Initial Client Interview Information Gathering Process, Client Questionnaire Forms,” Basic Will and Trust Drafting, ICLEF, 1993.

“Indiana Inheritance and Estate Taxes-New Regulations, Same Old Taxes, “Probate Skills Series Part Four: The Final Scene – Dealing with Taxes and Closing the Estate, ICLEF, 1994.

“Designing and Drafting CRT’s and Gift Annuities-The Nuts and Bolts and Beyond,” Concepts and Technique In Charitable Giving, ICLEF, 1995.

“Ethical Problems,” Untrustworthy Non-Probate Transfers, ICLEF, 1998.

“Federal Estate Tax Elections, §§2032, 2032A, and 2057,” Disclaimers and Postmortem Planning, ICLEF, 1999.

“Indiana Estate Planning System,” Midwest Estate Planning Institute, ICLEF, 2000.

“Indiana Uniform Prudent Investor Act,” Estate Planning Workshop, Marco Island, Florida, ICLEF, 2000.

“Recent Non-Tax Statutes and Cases Concerning Last Wills and Testaments, Estates and Trusts,” Second Annual Vincennes University Wills, Trusts, and Ethics Institute, 2000.

“Ethical Considerations,” Elder Law, ICLEF, 2000.

“Indiana Estate Planning System,” Annual Solo and Small Firm Conference, ICLEF, 2000.

“Ethical Considerations,” Fellows Estate Planning Institute, ICLEF, 2001.

“Indiana Estate Planning System,” Midwest Estate Planning Institute, ICLEF, 2001.

“Estate Planning Forms (Intake),” Planning Your First Wealth Plan Under \$675,000, ICLEF, 2001.

“Ethical Considerations,” Current Estate Administration Issues, Bank One, 2001.

“Recent Non-Tax Developments,” Third Annual Vincennes University Wills, Trusts, and Ethics Institute, 2001.

“Ethical Considerations,” Second Annual Fellows Estate Planning Institute, ICLEF, 2002.

“Indiana Uniform Principal and Income Act: Power to Adjust” and “Indiana Uniform Prudent Investor Act,” Recent Statutory Developments in Probate and Estate Matters, ICLEF, 2002.

“Recent Non-Tax Developments,” Fourth Annual Vincennes University Wills, Trusts and Ethics Institute, 2002.

“Indiana Probate Practice: Recent Non-Tax Developments,” Mexico Institute, ICLEF, 2003.

“Ethical Considerations,” Estate and Tax Seminar, Stock Yards Trust Co., 2003.

“Recent Non-Tax Developments,” Fifth Annual Vincennes University Wills, Trusts, and Ethics Institute, 2003.

“Claims Against Non-Probate Property,” Midwest Estate Planning Institute, ICLEF, 2004.

“Probate Problems and Ethical Considerations,” Judicial Conference, Evansville, 2004.

“Liability of Nonprobate Transferees for Creditor’s Claims and Statutory Allowances” and “Recent Non-Tax Developments,” 15<sup>th</sup> Annual EBA Estate & Business Planning Institute, Evansville Bar Association, 2004.

“Recent Non-Tax Developments,” Sixth Annual Vincennes University Wills Trusts and Ethics Institute, 2004.

“Indiana Power of Attorney Act, Recent Developments,” Elder Law Training, ICLEF, 2004.

“Cool Forms,” Hot Tips and Cool Forms in Estate and Business Planning, ICLEF, 2005.

“Recent Developments,” 2005 Estate Planning Day, Hoosier Hills Estate Planning Council, 2005 (also Indiana Power of Attorney Act, Recent Developments and Uniform Prudent Investor Act); 16<sup>th</sup> Annual EBA Estate & Business Planning Institute, Evansville Bar Association, 2005; Seventh Annual Vincennes University Wills, Trust and Ethics Institute, 2005; Elder Law Training, ICLEF, 2005; Estate Planning Update, ICLEF, 2006; Indianapolis Estate Planning Council, 2006; Estate and Tax Seminar, Stock Yards Trust Co. 2006.

“Ethical Considerations” and Unauthorized Practice of Law”, 17<sup>th</sup> Annual EBA Estate & Business Planning Institute, Evansville Bar Association, 2006.

“Recent Non-Tax Developments”, Eighth Annual Vincennes University Wills, Trust and Ethics Institute, 2006.

“Claims and Nonprobate Transfers”, Elder Law Training, ICLEF, 2006.

“Estate Planning for the Elderly: Systems and Ethics”, Elder Law Training, ICLEF, 2007.

“Ethical Considerations”, Estate and Tax Seminar, Stock Yard Trust Co. 2007.

“Recent Non-Tax Developments”, 18th Annual EBA Estate & Business Planning Institute, Evansville Bar Association, 2007; and Ninth Annual Vincennes University Wills, Trust and Ethics Institute, 2007.

“Unauthorized Practice of Law”, Hoosier Hills Estate Planning Council (Bloomington), February 2008.

“Recent Developments”, Estate and Tax Seminar, Stock Yard Trust Co., October 2008 and Tenth Annual Vincennes University Wills, Trust and Ethics Institute, December 2008.

“Recent Developments” and “Transfer on Death Property Act”, Midwest Estate and Tax Institute, ICLEF, June 2009; Advanced Estate and Business Planning, ICLEF, July 2009; Elder Law Institute, ICLEF, October 2009; and Eleventh Annual Vincennes University Wills, Trusts and Ethics Institute, December 2009.

“Indiana Death Taxes”, Estate Planning Council of Central Illiana, March 2011.

“Transfer on Death Property Act”, Indiana Recorder’s Association Annual Meeting, April 2011; Evansville Bar Association, May 2011; Assessor’s Association Annual

Meeting, August 2011; and Indiana Land Title Association Meeting, December 2011.

Chaired “Asset Protection” seminar, November 2, 2011, ICLEF, 2011.

“Recent Developments”, Estate and Tax Seminar, Stock Yard Trust Co., October 2011; Thirteenth Annual Vincennes University Wills, Trust and Ethics Institute, November 2011; and 22nd Annual EBA Estate and Business Planning Institute, Evansville Bar Association, November 2011.

“Recent Developments”; Fourteenth Annual Vincennes University Wills, Trust and Ethics Institute, December 2012; and 23rd Annual EBA Estate and Business Planning Institute, Evansville Bar Association, November 2012.

“Transfer on Death Property Act”, Indiana Recordors Association Annual Convention, April 2013; “Death Tax Review”, Indiana Bankers Annual Convention Mega2013, May 2013.

“Ethical Considerations”, Midwest Estate and Tax Institute, June 2013, ICLEF.

Co-chaired: Midwest Estate and Tax Institute, June 2013, ICLEF.

Chaired: Master Series – Estate Planning, July 2013, ICLEF.

“Recent Developments”; 15<sup>th</sup> Annual Vincennes University Wills, Trust and Ethics Institute, December 2013; and 24th Annual EBA Estate and Business Planning Institute, Evansville Bar Association, November 2013.

Co-chaired: Midwest Estate and Tax Institute, June 2014, ICLEF.

“Recent Developments”; 16<sup>th</sup> Annual Vincennes University Wills, Trust and Ethics Institute, December 2014; and 25th Annual EBA Estate and Business Planning Institute, Evansville Bar Association, November 2014.

“Digital Assets”; Estate Planning 101; April 2015; ICLEF.

Co-chaired: Midwest Estate and Tax Institute and spoke on: “Indiana Developments”; June 2015, ICLEF.

“Recent Developments”; 17<sup>th</sup> Annual Vincennes University Wills, Trusts and Ethics Institute, December 2015.

Co-chaired: Midwest Estate and Tax Institute and spoke on; “Recent Developments”; June 2016, ICLEF.

“Recent Developments” 18<sup>th</sup> Annual Vincennes University Wills, Trust and Ethics Institute, December 2016; and 27<sup>th</sup> Annual EBA Estate and Business Planning Institute, Evansville Bar Association, November 2016.

Co-chaired: Midwest Estate and Tax Institute and spoke on; “Recent Developments”; June 2017, ICLEF.

“Recent Developments”; 19<sup>th</sup> Annual Vincennes University Wills, Trust and Ethics Institute, December 2017; and 28<sup>th</sup> Annual EBA Estate and Business Planning Institute, Evansville Bar Association, November 2017.

Co-chaired: Midwest Estate and Tax Institute and spoke on: “Claims, Nonprobate Transfers, and No Contest Provisions”; June 2018, ICLEF.

“Recent Developments”; 29<sup>th</sup> Annual EBA Estate and Business Planning Institute, Evansville Bar Association, November 2018.

Co-chaired: Midwest Estate and Tax Institute and spoke on: “Indiana Legacy Trust” and “Directed Trusts, Quiet Trusts, Nonjudicial Settlements and Termination”; June 2019, ICLEF.

“Indiana Legacy Trust and More”; Advanced Estate Planning at French Lick, July 25, 2019, ICLEF.

“Indiana Legacy Trust”; 30<sup>th</sup> Annual EBA Estate and Business Planning Institute; Evansville Bar Association, November 2019.

“Indiana Legacy Trust and More”; 20<sup>th</sup> Vincennes University Wills, Trust and Ethics Institute, December 2019.

Co-chaired: Midwest Estate and Tax Institute; June 4 & 5, 2020, ICLEF.

“Recent Developments”; 31<sup>st</sup> Annual EBA Estate and Business Planning Institute; Evansville Bar Association, November 6, 2020.

Co-chaired: Midwest Estate and Tax Institute; June 3 & 4, 2021, ICLEF.

“Indiana Legacy Trust”; Asset Protection, April 28, 2022, ICLEF.

Co-chaired: Midwest Institute, June 9 & 10, 2022, and spoke on “Ethical Considerations”, ICLEF.

“Ethical Considerations”; 21<sup>st</sup> Vincennes University Wills, Trust and Ethics Institute, December 2022.

Co-chaired: Midwest Institute, June 8 & 9, 2023, ICLEF.



**Local Activities:**

YMCA, 1976-present  
Board of Directors 1993-present  
President-1999-2001

Vincennes Education Foundation, 1993-2010  
Board of Directors, 1994-2010  
President, 1998-1999

Knox County Community Foundation, 1998-2010  
Board of Directors, 1998-2002; 2008-2010  
President, 2000

Lincoln High School Academic Society, 1989-present  
Board of Directors, 1989-present

St. James Episcopal Church, Vincennes, Indiana,  
Senior Warden, 1986 and 1999  
Vestry, 1984-1986 and 1998-2000

Wabash Valley Estate Planning Council,  
Founding member and first president

Vincennes Community School Corporation  
School Board, 1986-1997  
President, 1989-1990, 1991-1992 and 1996-1997

Knox County United Way, 1986-2010  
President, 1989-1990  
Board of Directors, 1986-1999

Vincennes Civitan Club, 1976-1990  
President, 1980-1981  
Civitan of Year, 1982

Old Town Players, Inc. 1980-1997  
Board of Directors, 1984-1997

Old Northwest Corp., 1976-1994  
Board of Directors, 1988-1992

Fort Knox II Committee, 1982-1990  
Ad hoc committee, Indiana Historical Society

Old Northwest Running Club, Inc., 1979-1984  
Founding member and first president

### **Recognitions and Awards:**

Sagamore of the Wabash 2019 [Indiana's highest civilian award].

Best Lawyers (2009- present): Indiana Best Lawyer Trust and Estates 2015; Indiana Business Magazine.

Presidential Citation (2009); Indiana State Bar Association (for UPL work).

Board Certified Indiana Trust and Estate Lawyer (formerly "Certified Estate Planning and Administration Specialist" 2006 to present): Trust and Estate Specialty Board (formerly "Estate Planning and Administration Specialty Certification Board").

Hall of Fame (2006), GP Section, Indiana State Bar Association.

Super Lawyer (2005 to present): Indianapolis Monthly Magazine - top 10 in 2008, top 50 in 2007, 2009, 2010, 2011, 2012 and 2013.

Lifetime Service Award (2004): Probate Trust and Real Property Section, Indiana State Bar Association [only recipient].

The Best Lawyers in America (2001-present).

Who's Who in American Law (2000-present).

ISBA Award (1995-1996): (Probate newsletter).

Golden Shoe Award (1985): Old Northwest Running Club.

Citation of Merit (1980): ISBA Res Gestae (writing award).

Civitan of the Year (1980).