



## James "Jim" C. Milton

### Shareholder & Director

Resident in Tulsa

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An experienced trial and appellate attorney, Jim Milton practices in the areas of commercial litigation, water law, and trust and estate litigation. He also serves on the firm's Board of Directors. Throughout his career he has focused on assisting clients with trust and estate litigation, including probate, will contests, guardianship and elder abuse. Within this practice, Jim regularly assists other attorneys in resolving complex probate, trust and guardianship disputes - whether as first or second chair litigator, strategy consultant, or resource for research and preparation of pleadings and legal arguments. Jim also provides compliance reviews in guardianship and probate matters, and assists in resolving complex real title issues in the fiduciary context.

Additionally, Jim has developed a water law practice that includes defending developers and municipal utility authorities against claims asserted by rural water districts, as well as drafting wholesale water contracts.

Jim has been recognized an Oklahoma Super Lawyer in Estate & Trust Litigation, as well as a Band 3 attorney by Chambers USA in General Commercial Litigation and Band 2 by Chambers High Net Worth Guide which ranks the top lawyers and law firms for international private wealth. He was named the 2021 Best Lawyers Tulsa Litigation-Trusts & Estate "Lawyer of the Year," and also listed as a Best Lawyer in America in Commercial Litigation, Litigation-Municipal, Litigation-Trusts & Estates and Water Law. Further, he has an individual AV peer review rating by Martindale Hubbell, received a President's Award from the Tulsa County Bar Association in 2009, 2018 and 2019. In 2011, he accepted the Oklahoma Bar Association Golden Gavel Award on behalf of the OBA Civil Procedure & Evidence Code Committee, which he chaired for 12 years.

In addition, in 2006 Jim was named to The Journal Record's "Achievers Under 40" list and in 2009 to its "Leadership in Law" list, while in 2013 he was named to the Power Attorneys & Legal Professionals list by the Tulsa Business & Legal News.



## Education

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- Oklahoma State University (B.S.B.A. in Finance and Economics)
- University of Texas School of Law (J.D., *with honors*, 1995)

## Admissions

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- Oklahoma

## Practices

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- Alternative Dispute Resolution (ADR)
- Appellate
- Complex Commercial Issues
- Elder Law
- Electronic Discovery
- Estate Planning & Post Death Administration
- Guardianships
- Insurance Law & Tort Litigation
- Litigation
- Municipal & Public Authority
- Trusts & Estates Litigation
- Water Law & Land Rights

## Specialty Areas

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- Water Law

## Legal Experience

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- 2012 - Present Hall Estill
- Doerner, Saunders, Daniel & Anderson, LLP

## Reported Cases

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- *Zink v. Avery, McGill and Shackelford*, 2017 OK CIV APP 44

## Professional Involvement

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- Member, Oklahoma Association of Municipal Attorneys, Inc.
- Tulsa County Bar Association, President, 2019-2020; Past President 2020-2021
- Oklahoma Bar Association, Co-Chair Legislative Committee and Social Chair, Tulsa for Estate Planning, Probate & Trusts Section
- Fellow, the American College of Trust & Estate Counsel; Member, Fiduciary Litigation, State Laws and Communications Committees

## Community Involvement

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- Participant, Tulsa Area United Way Emerging Leaders Philanthropy Forum: Criminal Justice Reform, 2018

## Teaching/Lecture Experience

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- Served at program co-chair for the American College of Trust and Estate Counsel (ACTEC) "Heart of America Fellows Institute," April 2018 (Oklahoma City).
- Served as panelist, moderator, speaker or organizer for more than 50 continuing education seminars on issues including estate planning, trust administration, water rights and creditor rights.

## Published Articles

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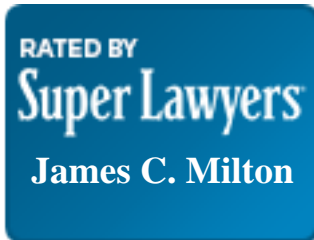
- James C. Milton & Katherine R. Guzman, *Decision and Persuasion: Re-Conceiving the Role of the Planner where Undue Influence is Suspected*, 44 ACTEC L.J. 137 (2019)

## Honors & Awards

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JAMES C. MILTON



## In the News

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- James Milton Tulsa World Business Viewpoint: Find New, Digital Ways to Network
- Jim Milton speaking at Cambridge Forum on Private Wealth Litigation

## Awards & Recognition

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- Trust & Estate Attorney Jim Milton named to 2020 Chambers High Net Worth Guide
- Hall Estill Shareholders Honored for Outstanding Contributions by Tulsa County Bar

## Events & Presentations

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- Jim Milton speaking at Cambridge Forum on Private Wealth Litigation

## Published Articles

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- Trust and Estate Attorney Jim Milton: Revisiting Pleading Standards?
- Jim Milton - Legal Perspective: Bar Association to consider trust decanting proposal
- Jim Milton Op Ed Piece Selected for publication in *"How Bad It Was How Good It Is - The Value of an Independent Oklahoma Judiciary."*
- Jim Milton Authors Article for Oklahoma Bar Journal
- Jim Milton Co-Authors Article for Oklahoma Bar Journal
- Jim Milton Authors Article, "Paying Trustee Attorney Fees from the Trust Estate"

## Gavel to Gavel

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- Tulsa Trust & Estate Attorney James Milton - Venue in Trust and Probate Proceedings

- Legislative Wish List
- Trust and Estate Attorney Jim Milton: Revisiting Pleading Standards?
- Gavel to Gavel: Pretermitted heirs by Jim Milton
- Investing Guardianship Assets
- Certainty in Receiverships
- Fiduciary Accountings
- Probate Claims
- Subtle Changes
- And That Is An Order
- What is a Trust Protector?
- Fiduciary Access to Digital Assets
- Civil Disobedience in the Statehouse?
- James Milton Gavel to Gavel on OK Supreme Court 10 Commandments Ruling
- Tug of War
- Another Run at Dynasty Trusts
- Lodestars and Multipliers
- You've Got Mail
- Muddy Water
- Remote Control
- Keeping Common Sense Alive
- Discovering Efficiencies
- Greener Pastures
- Attorney Fees in Guardianships
- Discovery Matters
- Mixed Bag of Bills
- Sorting it Out
- Constitutional Differences
- Road to Reform
- Protecting the Elderly
- Matters of Trust
- A Battle for Water