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Diane R. Sargeant is a partner and co-founder of the law firm of Cox, Sargeant & Burns, P.C. Ms. Sargeant devotes her practice exclusively to personal estate planning for individuals and married and unmarried couples and to estate and trust administration, focusing on wealth transfer planning, business succession planning and gift and estate tax planning techniques.

General: Born in 1950; admitted to Indiana bar, U.S. District Court, Southern and Northern Districts of Indiana in 1987, and the U.S. Tax Court in 1990.

Education: Indiana University School of Law, Indianapolis (J.D., 1987); Indiana University School of Business (B.S. with high distinction, 1983).

Experience:

Cox, Sargeant & Burns, P.C. (1999 – present); Partner

Leagre Chandler & Millard (1987 – 1999); Associate Attorney and Partner

Certifications: Indiana Certified Specialist in Estate Planning and Administration by the Estate Planning and Administration Specialty Certification Board of the Indiana State Bar Association.

Business and Civic: Member, Estate Planning Council of Indianapolis, 1989 – present; Member, the Indiana University School of Medicine Planned Giving Committee, 2010 – present; former Member, the Central Indiana Community Foundations Professional Advisor Leadership Council (current Member of the Cornerstone Council); Volunteer Participant in the Indianapolis Bar Association's Pro Bono Law Asset Will Program and Hospice Program, 2009 – present; Board Member/Board Vice President, Indiana Buddhist Center, 2013 – present.

Author: "The Problems of the 'Inherited Trust': Potential Liability of Successor Trustees," Hoosier Banker Magazine, June 1992; "The Closely Held Business as an Estate Asset," Probate and Property Feature, Res Gestae Magazine, June 1992; "Helping Our Clients Do Good By Planning Well", Central Indiana Community Foundation Advisor's Newsletter, Winter 2009.

Lecturer: Lecturer on a variety of estate planning topics, including, "Personal Agencies and Trusts," "New Indiana Uniform Transfers to Minors Act," and "Estate Settlement," presented at "The Trust Business, An Introductory Seminar for Bank Trust Officers," Indiana Bankers Association, February 1990; "Legalities of Marketing Health Care Products in Japan," presented at an International Business Briefing, U.S. Department of Commerce, October 1990; "Federal Estate Tax Elections," presented at "1991 Indiana Bankers Association Trust Seminar," February 1991; Estate Planning," presented at "Compensation Alternatives for the Association Executive," The ISAE Foundation, October 1992; "Estate Planning for Second Marriages," presented to the International Association for Financial Planners, Indianapolis Chapter, February 1994; "Estate Planning Implications for the Emerging Business Owner," presented at The Indianapolis Chapter of CLU and ChFC, Inc. continuing education program, "Life Insurance, IPO's and the Small Company Securities Market," April 1994; "Trustee Resignation or Removal," "Amending and Terminating Trusts," and "Choosing a Trustee" presented at Indiana Trust Administration Seminar, July 1996; "Techniques in High Net Worth Planning," presented at ICLEF seminar, August 1996.

Member: Indianapolis and Indiana State Bar Associations; Indiana State Bar Association Estate Planning and Administration Section; Indianapolis Bar Association Probate, Trust and Real Property Section.

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