

# The Landman Case — Case Background & Fact Pattern

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## ▸ Before you begin

*A pre-read for attendees. This is the background the collaborative team is working from as the case begins. You'll meet the family here; you'll watch the work unfold over the four meetings on the training day.*

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## The Family at a Glance

Tommy and Angela Norris have been married for more than twenty years. They live in **Midland, Texas** — the heart of the Permian Basin — where Tommy has built a career in the oil business and Angela has built the family.

Theirs is a high-income, high-spending household. For most of the marriage it ran on an unspoken division of labor: Tommy earned the money and Angela ran the home, the children, and the family's social life. Neither one looked too closely at the other's domain. That arrangement held for two decades. It is now coming apart, and the collaborative team has been retained to help the Norrises restructure their family without going to court.

They have two children: **Cooper**, in his early twenties and recently married, and **Ainsley**, sixteen and a sophomore in high school. Tommy's father, **T.L. Norris**, is aging and in declining health following the recent death of Tommy's mother.

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## The People

### Tommy Norris — Husband

President of **Tall City Resources, LLC**, a private independent oil company, where his compensation combines a salary with production-based bonuses tied to the price of oil. Before Tall City he spent years at **ExxonMobil**, leaving behind a defined-benefit pension he began earning before the marriage and restricted stock from his time there.

Tommy is capable and decisive at work and far more conflict-avoidant at home. He tends to solve personal problems the way he solves business problems — quickly, privately, and on his own. The oil-price cycle is the floor beneath the family's life: when prices are strong the household thrives, and when they fall everything tightens. Tommy has weathered a financial collapse earlier in his career, and the memory of it shapes how he thinks about money and risk.

## Angela Norris — Wife

Angela has not worked outside the home in eighteen years, but she has run a complex household throughout the marriage — raising two children largely on her own while Tommy was on a rig or in a boardroom, and managing the family's standing in a community where social obligations carry real weight. She is warm, protective of her children, and accustomed to a particular standard of living.

Angela has had little visibility into the family's actual financial position. She has generally assumed that the marital estate is straightforward and shared equally between them. As the process begins, her central concern is security — understanding what the family actually has, and knowing she and the children will be provided for.

## Ainsley Norris — Daughter (16, high-school sophomore)

A cheerleader and club volleyball player, image-conscious in the way of teenagers in a small Texas town. Ainsley is bright and anxious, and she has become the focus of a parenting disagreement. Angela would like to relocate with Ainsley to **Fort Worth** — a larger city she sees as a better platform for Ainsley's education and future. Tommy believes Ainsley is settled and thriving in Midland. Ainsley has her own feelings about where she wants to be, which a neutral child specialist has been engaged to explore. There is also a disagreement between the parents about whether Ainsley should be evaluated for a learning difference.

## Cooper Norris — Adult Son (early 20s)

Cooper works in the oil patch but is not yet financially independent. He recently married **Ariana**, who has a young son from a prior relationship, and the couple relies on the Norrises for ongoing support and for childcare. Cooper is not a party to the divorce, but the family's continued financial support of him — and the question of when and how that support should change — is very much part of what Tommy and Angela need to work out. Angela is deeply committed to continuing to help him; Tommy would like to see a clear path to independence.

## T.L. Norris — Tommy's Father

Recently widowed and in declining health, T.L. needs increasing in-home care. The cost and responsibility of that care, and how it fits into two restructured households, is one more obligation the family has to plan around as they divide a single household into two.

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## What the Team Is Working With

This is a financially complex, cash-tight estate despite the family's income. The wealth is largely illiquid and tied up in the oil business, retirement assets, real property, and other interests that are not easily divided. Layered on top of the financial picture are the human

ones — a long marriage built on a division of labor that left one spouse without a clear view of the family’s finances, two adult-and-adolescent children with very different needs, an aging parent, and a family that has weathered financial stress before.

The collaborative team’s task is the one collaborative practice was built for: to help the Norrises see their whole situation clearly, surface what each of them actually needs, and design a resolution that holds — for both households and for three generations of this family.

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## How to Use This Background

The first collaborative meeting (Meeting 1) has already occurred; its agenda and minutes are included in your pre-read package, along with the financial materials the team is reviewing. On the training day you’ll join the case at Meeting 2, where the team begins working through the estate in earnest. Come knowing the family — the rest unfolds in the room.