



Financial & Estate Planning
May 17, 2018
Edgewood Country Club
Charleston WV

This annual event sponsored by the WV Bankers Association, the WV Society of CPAs and the WV State Bar Probate Law Committee attracts participants from bank trust departments, CPAs, insurance agents, financial planners and attorneys.

Confronting the Challenges of Tax Reform and Other Issues in Estate and Trust Planning and Administration: What Happened to the Certainty of Death and Taxes?

Charles D. "Skip" Fox IV, McGuire Woods, Charlottesville VA

Revised Uniform Fiduciary Access to Digital Assets Act and other Legislative Actions

Chris Winton, Ray, Winton & Kelley, PLLC

Legislative Update

Tom Heywood, Esq., Bowles Rice LLP

Thoughts on How Estate Planning Professionals can Minimize the Possibility of Family Disputes in Estate Matters

John Allevato Esq., Spilman, Thomas & Battle, PLLC

Hot Topics and Discussion of Items of Interest to Estate Planners (panel)

- *John F. Allevato, Esq., Spilman Thomas & Battle, PLLC*
- *Marcia Broughton, Esq., Jackson Kelly PLLC*
- *Joshua Rogers, Esq., Dinsmore and Shohl LLP*
- *Kim McCluskey, Esq., Wesbanco Trust*

Philanthropy WV

Paul Daugherty, EVP of Philanthropy WV

******NOTICE: The Seminar DOES NOT INCLUDE reception & dinner.***

Please be advised that if you plan to stay for the reception & dinner, you must register with the CEPC. If you do not register with the CEPC, you will not be permitted to stay for the reception & dinner. Please e-mail Terry Mathias to register for reception & dinner: tmathias@earthlink.net, cost is \$75 per person.

****Speakers and agenda are subject to change****

Financial & Estate Planning Seminar May 17, 2018

Edgewood Country Club
1600 Edgewood Drive
Charleston WV 25302

(For Directions - www.edgewoodcc.com)

Continuing education credit hours:

- MCLE (Attorneys) - TBD
- CPE (CPAs) - TBD
- CE (Insurance) - TBD
- IMCA - Self-reporting
- CTFA - Self-reporting

Registration Fee: \$225.00 (Registration fee includes continental breakfast and lunch)

Registration fee cost DOES NOT INCLUDE reception & dinner. Please be advised that if you plan to stay for the reception & dinner, you must register with the CEPC. If you do not register with the CEPC, you will not be permitted to stay for the reception & dinner. Please e-mail Terry Mathias to register for reception & dinner: tmathias@earthlink.net

Registration: 8:15 a.m.

Session: 9:00 a.m. - 5:00 p.m.

Cancellation Policy: Registration fees may be refunded, less \$20 for processing, for written cancellations emailed by 5 p.m. up to four business days before the seminar or by phone call made to Kathy Henning 304-553-7225 or Anita Casey 304-553-7228 up to four business days before the seminar. No refunds will be issued within the 72 hours before the event is held. Canceled registrations may not be transferred. You may send a substitute in lieu of canceling.

To register, go to: <https://www.mywvbar.org/civicrm/event/info?reset=1&id=222>

Registration will close on May 11th. (Payment must be made at time of registration.)

Notice:

There will be no printed material (notebooks) distributed at the seminar. All registrants will receive an email on May 14th with seminar content.

Questions? Contact Amanda Cunningham at acunningham@wvbankers.org

West Virginia Bankers Association
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