

Financial & Estate Planning Seminar
May 17, 2018

- 8:15 a.m. Registration & Continental Breakfast
- 8:45 – 9:00 **Welcome from WV Bankers Association, WV Society of CPAs, WV State Bar**
- 9:00 – 10:30 **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
- 10:30 – 10:40 Break
- 10:40 – 12:05 **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? (cont)**
Charles D. “Skip” Fox IV, McGuire Woods, Charlottesville VA
- 12:05 – 12:35 Lunch
- 12:35 – 1:05 **Legislative Update**
Tom Heywood, Esq., Bowles Rice LLP
- 1:05 – 1:15 Break
- 1:15 -- 2:15 **Revised Uniform Fiduciary Access to Digital Assets Act and other Legislative Actions**
Chris Winton, Ray, Winton & Kelley, PLLC
- 2:15 – 3:15 **Thoughts on How Estate Planning Professionals can Minimize the Possibility of Family Disputes in Estate Matters**
John Allevato Esq., Spilman Thomas & Battle, PLLC
- 3:15 – 3:30 Break
- 3:30 – 5:00 **Panel – Hot Topics and Discussion of Items of Interest to Estate Planners**
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

*****NOTICE:** 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

- 5:15 – 5:45 **Reception (for Charleston Estate Planning Council members and paid guests)**
- 5:45 – 6:30 **Dinner (for Charleston Estate Planning Council members and paid guests)**
- 6:30 – 7:00 **Philanthropy WV**
Paul Daugherty, EVP of Philanthropy WV