

**Financial & Estate Planning Seminar**  
**May 16, 2019**

- 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 **Recognizing and Representing Clients Whose Capacity is Diminishing**  
*Professor Mary Radford, Georgia State University, Atlanta, GA*
- 10:30 – 10:40 Break
- 10:40 – 12:05 **Recognizing and Representing Clients Whose Capacity is Diminishing**  
*Professor Mary Radford, Georgia State University, Atlanta, GA*
- 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 **Planning with Retirement Assets**  
*Joshua Rogers, Esq., Dinsmore & Shohl, LLP*
- 2:15 – 3:15 **Simplified Ancillary Administration in West Virginia (and Some Other Probate Reform)**  
*Christopher J. Winton, Esq., Ray, Winton & Kelley, 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*  
*Christopher J. Winton, Esq., Ray, Winton & Kelley, PLLC*  
*David Underwood, Esq., United Bank*

---

**\*\*\*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](mailto: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)**



**Financial & Estate Planning**  
May 16, 2019  
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.

**Recognizing and Representing Clients Whose Capacity is Diminishing**

*Professor Mary Radford, Georgia State University, Atlanta, GA*

**Legislative Update**

*Tom Heywood, Esq., Bowles Rice LLP*

**Planning with Retirement Assets**

*Joshua Rogers, Esq., Dinsmore & Shohl, LLP*

**Simplified Ancillary Administration in West Virginia (and Some Other Probate Reform)**

*Christopher J. Winton, Esq., Ray, Winton & Kelley, PLLC*

**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*
- *Christopher J. Winton, Esq., Ray, Winton & Kelley, PLLC*
- *David Underwood, Esq., United Bank*

**Reception & Dinner (for Charleston Estate Planning Council members and paid guests)**

**\*\*\*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](mailto:tmathias@earthlink.net), cost is \$75 per person.

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

# Financial & Estate Planning Seminar May 16, 2019

Edgewood Country Club  
1600 Edgewood Drive  
Charleston WV 25302

(For Directions - [www.edgewoodcc.com](http://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: [tsmathias@earthlink.net](mailto:tsmathias@earthlink.net)

Registration: 8:15 a.m.

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

**Cancellation Policy:** Full refund on or before 5/2/19  
\$50 cancellation fee after 5/2/19  
No refund on or after 5/9/19 or for no-shows. Substitutions welcome.

**To register, go to:** <http://www.wvbankers.org/financial-and-estate-planning-seminar-0>  
Registration will close on May 10th. (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 13th with seminar content.

---

Questions? Contact Amanda Cunningham at [acunningham@wvbankers.org](mailto:acunningham@wvbankers.org)

West Virginia Bankers Association  
3601 MacCorkle Ave., SE, Suite 100 Charleston, WV 25304  
800-343-8038 or 304-343-8838 [www.wvbankers.org](http://www.wvbankers.org)