

Financial & Estate Planning Seminar
May 14, 2015

- 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 – 10:00 **Recent Developments**
Charles “Skip” Fox, Attorney, McGuire Woods LLP
- 10:00 – 10:10 Break
- 10:10 – 11:00 **Current Issues in Fiduciary Litigation**
Charles “Skip” Fox, Attorney, McGuire Woods LLP
- 11:00 – 11:10 Break
- 11:10 – 12:00 **Advanced Estate Planning Techniques: What Works and What Does Not**
Charles “Skip” Fox, Attorney, McGuire Woods LLP
- 12:00 – 1:15 Lunch
- 12:45 - 1:15 **Legislative Update**
Kit Francis, Attorney, Bowles Rice LLP
- 1:15 – 2:15 **Sheltering Assets from Nursing Home Costs**
Jerry Townsend, Attorney, Fluharty & Townsend
- 2:15 – 2:45 **Social Security Optimization**
Cindy McGhee, A&F Financial Advisors
- 2:45 – 3:00 Break
- 3:00 – 5:00 **Hot Topics – Contemporary Trends in Trust & Trust Administration**
 - **Selection of a Trustee – Corporate or Individual?**
 - **Trust Document Design**
 - **Use and Abuse of Nonjudicial Settlement Agreements Under the WV UTC**
 - **Directed Trusts....and More**

Panel:
John Allevato, Attorney, Spilman Thomas & Battle PLLC
Marcia Broughton, Attorney, Jackson Kelly PLLC
Laura Ellis, Vice President, BB&T Wealth Management
Jim Gardill, Attorney, Phillips Gardill Kaiser & Altmeyer PLLC
John Hussell, Attorney, Wooton Wooton & Davis PLLC
- 5:15 – 5:45 **Reception**
- 5:45 – 6:30 **Dinner and Wine Tasting with John Brown**
- 6:30 – 7:30 **Downsizing and Estate Disposal - Ken Farmer, Farmer Auctions**