

2015 Financial and Estate Planning Seminar

Plans are finalized for the 2015 Financial and Estate Planning Seminar to be held Thursday, May 14th at Edgewood Country Club in Charleston. This annual event sponsored by WV Bankers Association, WV State Bar Probate Law Committee and WV Society of CPAs, attracts participants from bank trust departments, CPAs, insurance agencies, financial planners and attorneys and features the latest and most current estate planning techniques. Your company has a unique opportunity to network with some of the top professionals in West Virginia in these fields. There is no other event in West Virginia that attracts all these groups of professionals. This year's speakers and topics are:

Charles "Skip" Fox, Attorney, McGuire Woods LLP

Recent Developments

Advanced Estate Planning Techniques: What Works and What Does Not

Current Issues in Fiduciary Litigation

Kit Francis, Attorney Bowles Rice LLP

Legislative Update

Jerry Townsend, Attorney, Fluharty & Townsend

Sheltering Assets From Nursing Home Costs

Cindy McGhee, A & F Financial Advisors

Social Security Optimization

Contemporary Trends in Trusts and Trust Administration – Panel Discussion by:

John Allevato, Attorney, Spilman Thomas & Battle PLLC

Marcia Broughton, Attorney, Jackson Kelly PLLC

Laura Ellis, Vice President, BB&T Wealth Management

Jim Gardill, Managing Member, Phillips, Gardill, Kaiser & Altmeyer PLLC

John Hussell, Attorney, Wooton Wooton & Davis PLLC

Ken Farmer, Farmer Auctions (Evening Session)

Downsizing and Estate Disposal

If you have a product you would like to showcase or if you wish to be a sponsor, please take advantage of this opportunity and complete the application form now. Both the exhibit and sponsorship opportunities include one free registration (\$260.00 value). For additional information, please email Donna Atkinson at datkinson@wvbankers.org or call 800-343-8038 or 304-343-8838.

Location: Edgewood Country Club, 1600 Edgewood Drive, Charleston WV 25302, www.edgewoodcc.com. **The program is one day and includes an evening session and dinner with wine tasting. The seminar begins with registration at 8:15 and adjourns at 7:30 pm.**

Application for Exhibitors and Sponsors

____ Exhibitor **\$375**, includes exhibit space and full registration for one person to attend the seminar, as well as recognition on signage and in promotional material.
As an exhibitor, will you need a table? _____ Electric? _____

____ Sponsor **\$375**, includes recognition on signage, promotional material and seminar registration for one.

Attendee Name _____
Company/Firm _____
Address _____
Phone _____ Email _____

***If you have additional attendees, please register separately on the WV State Bar registration link.**

Please mail your check along with this form by May 1, 2015 to:
West Virginia Bankers Association, 120 Washington St. East, Charleston WV 25301