Financial & Estate Planning

May 19, 2016
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.

Charles A. "Clary" Redd, Esq., Partner, Stinson Leonard Street LLP, St. Louis MO

- **Pernicious Problems and Promising Possibilities for Estate Planners in 2016**
- This presentation will cover selected recent legislative, regulatory and case law developments in estate planning, estate and trust administration and estate and trust-related litigation. Among the specific topics to be addressed are the fiscal year 2017 Green Book, the final portability regulations, the proposed regulations on basis consistency, continued viability of family limited partnerships and LLCs, net, net gifts, annual exclusion gifts, decanting pitfalls and a variety of breaches of fiduciary duty.

Tom Heywood, Esq., Bowles Rice LLP

- **Legislative Update**

Paul Daugherty, EVP of Philanthropy WV

- **Keep5Local**, a program funded through Philanthropy WV by the Benedum Foundation to work with community foundations around WV to keep 5% of the wealth transfer taking place in our state through endowed funds/estate planning.

Marcia Broughton, Esq., Jackson Kelly PLLC

- **Basic Generation-Skipping Tax**

J. Marlin Witt, CPA, CFP, CGMA, Arnett Carbis Toothman PLLC

- **Fiduciary Income Tax Issues**

John Allevato, Esq., Spilman Thomas & Battle PLLC
Chris Winton, Esq., Ray, Winton & Kelly PLLC

- **The New West Virginia Self-Settled Domestic Asset Protection Trust Legislation**

Panel Discussion—Hot Topics and Discussion of Items of Interest to Estate Planners
Panelists:

- ***John Allevato, Esq., Spilman Thomas & Battle PLLC***
- ***David Croft, Esq., Spilman Thomas & Battle PLLC***
- ***Laura Ellis, MBA, VP and Personal Trust Specialist, BB&T Wealth***
- ***John Hussell, Esq., Wooton Wooton & Davis PLLC***
- ***J. E. White, Esq., Anspach Meeks Ellenberger LLP***

Stay and join us for the evening session to include dinner and a demonstration by John Brown on wine paring, tasting and information on wine auctions.

Financial & Estate Planning Seminar
May 19, 2016

Edgewood Country Club
1600 Edgewood Drive
Charleston WV 25302
(For Directions - www.edgewoodcc.com)

Continuing education credit hours:
- MCLE (Attorneys) - 8.0
- CPE (CPAs) - 8.0
- CE (Insurance) - 8.0
- IMCA - Self-reporting
- CTFA - Self-reporting

Registration Fee: $260.00
$235.00 (Charleston Estate Planning Council Member)
(Registration fee includes continental breakfast, lunch, reception and dinner)

Registration: 8:15 a.m.
Session: 8:45 a.m. - 7:00 p.m.

Cancellation Policy: Full Refund if cancelled on or before 5/5/16
$50 Cancellation fee if cancelled after 5/5/16
No refund on or after 5/13/16 or for no-shows. Substitutions welcome.

To register, go to www.wvbar.org/events. Registration will close on May 16th.
(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 two days prior to the event to access the material. Late registrations will receive a CD at the seminar.

Questions? Contact Donna Atkinson at datkinson@wvbankers.org

West Virginia Bankers Association
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