

**Financial & Estate Planning Seminar**  
**May 18, 2017**

**\*\*Agenda\*\***

- 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 – 10:50   **Power, Money, Sex and Drugs – Elder Law in 21st Century America (Part I)**  
*Brad Gallant, Day Pitney, LLP*
- 10:50 – 11:00   Break
- 11:00 – 12:00   **Power, Money, Sex and Drugs – Elder Law in 21st Century America (Part II)**  
*Brad Gallant, Day Pitney, LLP*
- 12:00 – 12:30   Lunch
- 12:30 – 1:00    **Legislative Update**  
*Tom Heywood, Esq., Bowles Rice LLP*
- 1:00 – 1:50    **Fiduciary Litigation and Mediation**  
*John Hussell, Wooten, Davis, Hussell & Ellis, PLLC*
- 1:50 – 2:00    Break
- 2:00 – 2:50    **Nonjudicial Settlement Agreements under the UTC**  
*John Allevato Esq., Spilman, Thomas & Battle, PLLC*
- 2:50 – 3:40    **Discretionary Trust Distributions**  
*J. E. White, Anspach Law*
- 3:40 – 3:50    Break
- 3:50 – 5:00    **Panel – Hot Topics and Discussion of Items of Interest to Estate Planners**  
*John Allevato, Esq., Spilman Thomas & Battle PLLC*  
*Marcia Broughton, Esq., Jackson Kelly PLLC*  
*Chris Winton, Esq., Ray, Winton & Kelly PLLC*  
*Mike Lewis, United Bank Wealth Management*
- 5:15 – 5:45    **Reception**
- 5:45 – 6:30    **Dinner and Wine Tasting/Paring with John Brown**
- 6:30 – 7:00    **Guest Speaker: Hoppy Kercheval**

**\*\* Please note this agenda is subject to change\*\***