

# 2018 Financial and Estate Planning Seminar

Plans are being finalized for the 2018 Financial and Estate Planning Seminar to be held Thursday, May 17th at Edgewood Country Club in Charleston. This agenda is subject to change. 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.**

## What Happened to the Certainty of Death and Taxes?

Charles D. "Skip" Fox IV, McGuire Woods, Charlottesville VA

## Revised Uniform Fiduciary Access to Digital Assets Act and other Legislative Actions

Chris Winton, Ray, Winton & Kelley, PLLC

## Legislative Update

Tom Heywood, Esq., Bowles Rice LLP

## Thoughts on How Estate Planning Professionals can Minimize the Possibility of Family Disputes in Estate Matters

John Allevato Esq., Spilman, Thomas & Battle, PLLC

## Hot Topics and Discussion of Items of Interest to Estate Planners (panel)

John F. Allevato, Esq., Spilman Thomas & Battle, PLLC

Joshua Rogers, Esq., Dinsmore and Shohl LLP

Marcia Broughton, Esq., Jackson Kelly PLLC

Kim McCluskey, Esq., Wesbanco Trust

## Philanthropy WV

Paul Daugherty, EVP of Philanthropy WV

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 (\$225.00 value). For additional information, please email Amanda Cunningham at [acunningham@wvbankers.org](mailto:acunningham@wvbankers.org) or call 800-343-8038 or 304-343-8838.

**Location: Edgewood Country Club, 1600 Edgewood Drive, Charleston WV 25302, [www.edgewoodcc.com](http://www.edgewoodcc.com). The program is one day and includes breakfast and lunch. If you plan to stay for reception & dinner, please e-mail Terry Mathias to register [tmathias@earthlink.net](mailto:tmathias@earthlink.net). This is not included, cost is \$75 per person. The seminar begins at 8:15am and adjourns at 5:00 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 by going to [www.wvbankers.org](http://www.wvbankers.org) and click on the seminar in the event calendar.**

Please mail your check along with this form by May 1, 2018 to:  
West Virginia Bankers Association, 3601 MacCorkle Ave. SE, Suite 100, Charleston WV 25304