Financial & Estate Planning Seminar
May 17, 2018

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 – 10:30	**Confronting the Challenges of Tax Reform and Other Issues in Estate and Trust Planning and Administration: What Happened to the Certainty of Death and Taxes?** *Charles D. "Skip" Fox IV, McGuire Woods, Charlottesville VA*
10:30 – 10:40	Break
10:40 – 12:05	**Confronting the Challenges of Tax Reform and Other Issues in Estate and Trust Planning and Administration: What Happened to the Certainty of Death and Taxes?** *(con't)* *Charles D. "Skip" Fox IV, McGuire Woods, Charlottesville VA*
12:05 – 12:35	Lunch
12:35 – 1:05	**Legislative Update** *Tom Heywood, Esq., Bowles Rice LLP*
1:05 – 1:15	Break
1:15 -- 2:15	**Revised Uniform Fiduciary Access to Digital Assets Act and other Legislative Actions** *Chris Winton, Ray, Winton & Kelley, PLLC*
2:15 – 3:15	**Thoughts on How Estate Planning Professionals can Minimize the Possibility of Family Disputes in Estate Matters** *John Allevato Esq., Spilman Thomas & Battle, PLLC*
3:15 – 3:30	Break
3:30 – 5:00	**Panel – Hot Topics and Discussion of Items of Interest to Estate Planners** *John F. Allevato, Esq., Spilman Thomas & Battle, PLLC* *Marcia Broughton, Esq., Jackson Kelly PLLC* *Joshua Rogers, Esq., Dinsmore and Shohl LLP* *Kim McCluskey, Esq., Wesbanco Trust*

*****NOTICE**: Please be advised that if you plan to stay for the reception & dinner, you **must** register with the CEPC. If you do not register with the CEPC, you <u>will not be permitted</u> to stay for the reception & dinner. Please e-mail Terry Mathias to register for reception & dinner: tsmathias@earthlink.net, cost is $75 per person.

5:15 – 5:45	**Reception (for Charleston Estate Planning Council members and paid guests)**
5:45 – 6:30	**Dinner (for Charleston Estate Planning Council members and paid guests)**
6:30 – 7:00	**Philanthropy WV** *Paul Daugherty, EVP of Philanthropy WV*