



Agenda for Spokane Estate Planning Council 2017 Annual Seminar

May 23, 2017

Gonzaga University School of Law – Moot Court Room

7:30 AM	Registration	
8:00 AM	Welcome - Introduction	Charles J. Murphy , <i>Vice President for Finance, Gonzaga University</i>
8:15 AM	Opening Remarks	Stephanie Taylor , <i>SEPC President</i> J.D., LL.M. <i>Randall/Danskin, P.S.</i>
8:30 - 9:30 AM	Secondary Planning for CRT's	David Murray , <i>Managing Director of Sterling Foundation Management LLC</i>
9:30 – 10:45 AM	The Bridge Trust – Offshore Protection with Domestic Simplicity	Douglas Lodmell , J.D., LL.M. <i>Lodmell and Lodmell</i>
10:45 – 11:00 AM	BREAK	
11:00 – 11:30 AM	Economic Update	Michael Brejda , <i>Managing Director, US Trust Portfolio Management</i>
11:45 – 1:15 PM	SEPC Annual Meeting & Lunch McCarthy Athletic Center	<u>Keynote Speaker:</u> Phillip Tyler , <i>Former President Spokane Chapter NAACP and President/Consultant of Wisdom in Words</i>
1:15 – 2:15 PM	Understanding your Social Security Options	J. Patrick Clunan , <i>Manager, the Learning Center Columbia Threadneedle Investments</i>
2:15 – 3:15 PM	Administering Unusual Assets and Cannabis	Wendy S. Goffe , <i>JD, Partner Stoel Rives LLP</i>
3:15 – 3:30 PM	BREAK	
3:30 – 4:30 PM	What to Expect from President Trump's Tax Reform	Kelli Franco , <i>CPA, Partner & Val Perry</i> , <i>CPA, Partner Moss Adams LLP</i>