Agenda for Spokane Estate Planning Council 2016 Annual Seminar

May 17, 2016
Gonzaga University School of Law – Moot Court Room

7:30 AM	Registration	
8:00 AM	Welcome	**John Sklut, J.D.** *Chief of Staff to the President* *Gonzaga University*
8:15 AM	Opening Remarks	**David Green**, CPA/PFS, CFP®, AEP® *SEPC President*
8:30 AM	DUSK *by Bryan Harnetiaux, J.D.* *Copyright 2009 (rev. ed.)*	**Jamie Flannery** *Director*
9:30 AM	BREAK	
9:45 AM	PANEL DISCUSSION: Practical Planning for the End of Life	Facilitator: **Stephanie Taylor**, J.D., LL.M. *Randall|Danskin, P.S.* Panel**:** **Dr. Robert Bray**, Medical Director *Hospice of Spokane* **Brent Stanyer**, J.D. *Douglas Eden Phillips DeRuyter & Stanyer, P.S.* **Greer Gibson Bacon**, CFP® and Wealth Manager *Asset Planning & Management, Inc.*
11:45 AM	SEPC Annual Meeting & Lunch McCarthy Athletic Center *Stories, Struggles & Greatness in Everyday Life*	Keynote Speaker: **Joseph F. Albert**, Ph.D., *Associate Dean and Chair of the Department of Organizational Leadership* *Gonzaga University*
1:15 PM	Common Sense Isn't Always Common: The Role of Emotion in Personal Finance	**Stefanie Page, Financial Advisor &** **Jenny Gordon, Registered CSA** *Shea, Harley and Page Family Wealth Consulting and Management* *UBS Financial Services, Inc.*
2:15 PM	Coordinating IRAs with Estate Planning	**Judd Marten**, Attorney *LeSourd & Patten, P.S.*
3:15 PM	BREAK	
3:30 PM	Planning for the 99% - Risk Management – What to Protect and When!	**Paul Viren**, CLU, ChFC, AEP® *Viren and Associates, Inc.*

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FACULTY FOR THE SPOKANE ESTATE PLANNING COUNCIL'S

2016 ANNUAL CONFERENCE

JOHN SKLUT, J.D. is currently the Chief of Staff to the President, Gonzaga University. The President of Gonzaga University, Thayne McCulloh appointed John D. Sklut as chief of staff to the president in November 2015. Mr. Sklut serves on the president's cabinet and is responsible for advancing the interests of Gonzaga by supporting the vision and initiatives of the president, including management of special projects.

Sklut previously served as Gonzaga's interim Vice President of Administration and Planning as well as Assistant Corporation Counsel. He joined the University as Assistant Dean of Gonzaga University School of Law in 2008. He has more than 20 years of legal experience and earned his bachelor's degree from the University of California, San Diego and his juris doctorate from Loyola Law School, Los Angeles. Sklut is a current member of Rotary Club 21 and previously served as a member of the Board of Directors for both Spokane City Forum and YMCA of the Inland Northwest.

DAVID GREEN, CPA/PFS, CFP®, AEP® and SEPC President. David has over 33 years of experience in public accounting serving individuals on matters relating to taxation, including estate and gift tax planning, retirement planning, charitable giving strategies, income tax minimization, stock option planning and taxation of fiduciaries. David is the Managing Member of David Green CPA PLLC a boutique tax and advisory practice focusing on the needs of closely-held business enterprises and their owners. David is also an Adjunct faculty member teaching "IRS Practice & Procedure" in the Masters of Science in Taxation program at the Gonzaga's Jepson School of Business.

JAMIE FLANERY, Director Over the last 30 years, Jamie Flanery has enjoyed a plethora of theatrical experiences. He has worked as an actor in front of the camera on well over 80 projects. His film credits include "The Basket", "Verna: USO Girl", "The Family Holiday" and the KSPS production, "Rum Runners Paradise". He has worked on the production side as a prop master and on set decorator on numerous films and commercials. Jamie has enjoyed working on stage in such shows as "Lost in Yonkers", "A Few Good Men", "Shakespeare in Hollywood", "Over the River and Through the Woods" and most recently in the award winning production of Spokane Civic Theaters production of "Orphans". Jamie also won Best Actor kudos for Interplayers production of "You Say Tomatoes" and an independent production of "Blackbird". Jamie's directing credits include "Steel Magnolias", "Barefoot in the Park" and several productions for The Playwrights Festival at The Spokane Civic Theater.

DR. ROBERT F. BRAY, MD is currently the Medical Director for Hospice of Spokane, including Spokane Palliative Care and Mobile Medicine of Spokane. He is a graduate of the University of California, Irvine. He has been in medical practice for over 30 years, including rural and urban Family Medicine, teaching Family Medicine, and the last seven years in Hospice and

Palliative Medicine. He is board certified in Family Medicine, Geriatrics, and Hospice and Palliative Medicine.

STEPHANIE R. TAYLOR is a principal with the law firm of Randall | Danskin, P.S., where she practices in the areas of estate planning, probate and trust administration, trust and estate dispute resolution, tax controversies and closely held business planning. Ms. Taylor is licensed to practice in Idaho, Florida and Washington. She is a frequent speaker on estate planning, trust administration and taxation. Ms. Taylor is currently an adjunct professor for Gonzaga University School of Law where she teaches Estate Planning. Ms. Taylor is a fellow of the American College of Trust and Estate Council (ACTEC).

Ms. Taylor received her B.S. degree from Lewis-Clark State College, her MBA from Gonzaga University School of Business, her law degree from Gonzaga University School of Law and her LL.M. in Taxation from the University of Florida, Leven College of Law. She is a member of the Washington State Bar, the Spokane County Bar Association, the Florida Bar, the Idaho Bar and the American Bar Association. Ms. Taylor currently serves on the Executive Committee of the WSBA Real Probate Property and Trust Section, as well as a member of the Inland Northwest Community Foundation's Gift Planning Committee. Ms. Taylor is currently the Vice President of the Spokane Estate Planning Council.

Ms. Taylor is married to J. Todd Taylor, also an attorney with Randall | Danskin, and together they have two children, Jax and Bryn.

BRENT T. STANYER is a Principal with the Spokane Law Firm of Douglas, Eden, Phillips, DeRuyter & Stanyer, P.S. where his practice focuses on Elder Law and Special Needs Planning; Estate and Trust Planning, Corporations, Partnerships and LLCs; and Probate and Trust Administration. Mr. Stanyer graduated magna cum laude from Gonzaga University School of Law in 1992, where he was a Thomas More Scholar. Mr. Stanyer received his Master of Business Administration from Drucker Management Center at Claremont Graduate University. Mr. Stanyer is a past President of the Spokane Estate Planning Council, a Member of the Washington State Bar Association, an adjunct professor with both Whitworth College and Washington State University.

GREER GIBSON BACON CFP® has more than 30 years of professional and supervisory experience in financial services. Over her career, she has held numerous industry licenses, attended the Cannon Trust School in personal and employee benefit trust, and earned the Certified Financial Planner™ professional designation. Bacon is founder and president of Asset Planning & Management, Inc. A *fee-only* registered investment advisor, it provides comprehensive financial planning and investment management services to individuals and families. Bacon is a current member of the Financial Planning Association and Spokane Estate Planning Council. Also, she is a past member of the Financial Industry Regulatory Authority Board of Arbitrators, and State of Washington's Securities Advisory Committee, Financial Literacy Work and Financial Education Public-Private Partnership (FEPPP).

JOSEPH F. ALBERT, PH.D. is currently the Associate Dean and Chair of the Department of Organizational Leadership at Gonzaga University in Spokane, Washington. Joe is the Director of the Renaissance Center for Leadership at Gonzaga and also is co-Director of the Comprehensive Leadership Program for Undergraduate students at Gonzaga. He holds a Ph.D. in leadership, a master's degree in counseling psychology and two undergraduate degrees in business management.

In addition to teaching, Joe also provides consulting and training services to organizations in a number of areas including: understanding organizations, leadership in organizations, psychological issues in leadership, organizational change, motivation and empowerment.

STEFANIE PAGE is a Financial Advisor with the Spokane firm Shea, Harley & Page Family Wealth Consulting and Management at UBS Financial Services, Inc. Stefanie is passionate about helping clients achieve their goals and find comfort in their long-term financial outlook. Stefanie graduated with honors from Gonzaga University majoring in Finance and Economics and holds her Series 7, 9, 10, and 66 licenses. She and her husband, Jordan, have been married for nearly 10 years and they have two children, Maxton and Madeline.

JENNY GORDON joined Shea, Harley & Page at UBS in 2013. She is Series 7 and Series 66 licensed. Jenny serves as a dedicated personal relationship manager for the team. She graduated from the University of Montana with a degree in Finance and a degree in Marketing. When she is not in the office, she is off running Bloomsday and marathons.

JUDD R. MARTEN is an attorney and shareholder in the LeSourd & Patten, P.S. law firm. His practice emphasizes estate planning, employee plans and IRAs, and small business formation, sale, and transition of ownership. He is a frequent speaker, and has addressed both the Washington State Bar Association and the Washington Society of Certified Public Accountants in the areas of employee plans, IRAs, and the estate plan. Mr. Marten has an LL.M. in taxation, and he is an adjunct professor at the Seattle University School of Law, a member of the faculty of the Golden Gate University Graduate Tax Program, the WSBA Gift and Estate Tax Committee, and the Estate Planning Council of Seattle.

PAUL VIREN is the owner and president of Viren and Associates, Inc., an independent financial services firm based in Spokane, Washington, Paul has been providing a broad range of services to his clients for 20 years. His firm has coined the phrase "*Clear Solutions for the Chapters of Your Life*", which is the essence of his work. Whether planning and saving for retirement, building a business, providing employee benefits, protecting hard earned assets, paying for children's college or investing, each of us goes through unique chapters in life and every chapter has a financial aspect. Paul is a graduate of Whitworth University in Spokane, Washington and has received his credentials from the American College as a Chartered Life Underwriter and Chartered Financial Consultant. He is registered as an Investment Advisor Representative along with securities registrations 6, 7, 24, 63, and 65, held at LPL Financial and life and health insurance. In 2011, he was nominated by his peers in the Spokane Estate Planning Council to be recognized as an Accredited Estate Planner®. He works with his spouse, Beth, and together they have built a successful practice of financial planning, managing $200 million in brokerage and advisory assets as of December 31st, 2014. They also provide services to employers and individuals for retirement plans, health insurance, life, disability and long-term care protection strategies. He is the past president of the Spokane Estate Planning Council, serves on the board of the National Association of Estate Planners and Councils, is an active member with Spokane Rotary Club 21 and has served on many boards and civic groups in the community. Paul is an avid backpacker and runner, loves to “turn” wooden pens from exotic wood from around the world, and wine tasting…not at the same time!

Securities offered through LPL Financial, Member FINRA/SIPC, Investment Advice offered through Viren and Associates, Inc., a registered investment advisor and separate entity from LPL Financial.

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