



**SPOKANE
ESTATE PLANNING
COUNCIL**

**Please join us for the
Spokane Estate Planning Council
2017 Annual Seminar**

Date: Tuesday, May 23, 2017

Time: 7:30 am - 4:30 pm

Location: Gonzaga University

**Please join us at the Gonzaga University
School of Law - Moot Court Room for the
2017 Annual Seminar.**

Speaker Materials and Handouts will all be provided on flash drives again this year at registration. The materials will be available on our website by May 15th

<http://www.spokaneepc.org/events/event/14493>

Registration starts at 7:30 a.m.

Agenda

Welcome Introduction by Charles J. Murphy, Vice President for Finance, Gonzaga University

8:15

Sponsors



Opening Remarks by Stephanie Taylor, SEPC
President & Principal with Randall Danskin, P.S.

8:30 - 9:30

Secondary Planning for CRT's presented by David
Murray, Managing Director of Sterling Foundation
Management LLC

9:30 - 10:45

The Bridge Trust - Offshore Protection with Domestic
Simplicity presented by Douglas Lodmell, J.D.,
LL.M. Lodmell and Lodmell

11:00 - 11:30

Economic Update presented by Michael Brejda,
Managing Director, US Trust Portfolio Management

11:45 - 1:15

Lunch provided in the McCarthy Athletic Center and
our Keynote Speaker, Phillip Tyler, Former President
Spokane Chapter NAACP and President/Consultant
of Wisdom in Words

1:15 - 2:15

Understanding your Social Security Options
presented by J. Patrick Clunan, Manager, the
Learning Center Columbia Threadneedle Investments

2:15 - 3:15

Planning for Regulated Assets presented by Wendy S.
Goffe, JD, Partner Stoel Rives LLP

3:30 - 4:30

What to Expect from President Trump's Tax Reform
presented Kelli Franco, CPA, Partner and Val Perry,
CPA, Partner
Moss Adams LLP

*Continuing education credits have been approved for CFP
Board - 8 hours; MCLE 5.75 hours; CPE - 8 hours; Insurance
credit is not approved for this seminar.*

It's not too late to BRING A GUEST!

Please click to RSVP your Guest.

<http://www.spokaneepc.org/events/event/14493>



Douglas, Eden, Phillips,
DeRuyter & Stanyer P.S.



RICHARDS, MERRILL & PETERSON



Directions from I-90

1. Exit Hamilton Street (exit #282).
2. Proceed across bridge, north on Hamilton Street.
3. Turn left on Spokane Falls Boulevard (first traffic light).
4. Proceed one block and turn right onto Cincinnati Street.
5. Proceed one and a half blocks to School of Law parking lot.
6. Turn left into parking lot.
7. The Moot Court Room is on the first floor of the law school building.

Directions from Division/Ruby

1. Turn east onto Sharp Avenue.
2. Proceed to Hamilton Street (9 or 10 blocks).
3. Turn right onto Hamilton Street (traffic light).
4. Turn right onto Spokane Falls Boulevard (traffic light).
5. Proceed one block and turn right onto Cincinnati Street.
6. Proceed one and a half blocks to School of Law parking lot.
7. Turn left into parking lot.
8. The Moot Court Room is on the first floor of the law school building.

Directions from Hamilton/Nevada

1. Proceed south to Spokane Falls Boulevard (light just before bridge).
2. Turn right onto Spokane Falls Boulevard (traffic light).
3. Proceed one block and turn right onto Cincinnati Street.
4. Proceed one and a half blocks to School of Law parking lot.
5. Turn left into parking lot.
6. The Moot Court Room is on the first floor of the law school building.



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All members are listed by profession in our exclusive online membership directory, which serves as a quick resource for contact information and referral opportunities. You can enhance your listing with a professional photo and 25-30 word description of your practice. Please visit your profile to ensure your information is up to date.

<http://www.spokaneepc.org/members/directory>

If you do not recall your user name and password please contact
admin@spokaneepc.org

2016-2017 Membership Renewal is still open! Please visit today to renew online or to mail a check for your membership dues.

<http://www.spokaneepc.org/members/renewal>

Continuing Education Credits are included in your Spokane Estate Planning Council membership.

Each of our four Dinner Meetings and Annual full-day Seminar includes continuing education credits. Topics and Speakers will be announced soon.

Please Save the Date

November 1, 2016

January 10, 2017

March 14, 2017

May 23, 2017

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If you do not recall your user name and password please contact admin@spokaneepc.org

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