Agenda for Spokane Estate Planning Council
2018 Annual Seminar

May 15, 2018
Gonzaga University School of Law – Moot Court Room

7:30 a.m.	**REGISTRATION**	
8:00 a.m.	Welcome	**Joseph (Joe) Smith** **Chief Financial Officer** *Gonzaga University*
8:15 a.m.	SEPC President Opening Remarks	**Theresa Rodgers** **Vice President, Trust Officer** *US Trust, Bank of America* *Private Wealth Management*
8:30 a.m.	The Role of Aging Life Care Managers in Estate Planning	**Jennipher Ama, RN, CMC** **President & Aging Life Care Manager** *and* **Rhonda Spangler, BASW** **Aging Life Care Manager** *Family First Senior Center, Inc.*
9:30 a.m.	The Death of Long Term Care Insurance – Now What Do We Do?	**Paul Viren, CLU, ChFC, AEP®** **President/Owner** *Viren & Associates, Inc.*
10:30 a.m.	**BREAK**	
10:45 a.m.	Business Succession Planning *Protecting the family legacy* *using life insurance*	**Vicente Pina, AEP®, CLU, ChFC® FLMI, LLIF** **Director, Advanced Markets Group** *Individual Life Insurance* *Prudential Financial*
11:45 a.m.	SEPC Annual Meeting & Lunch Herak Room – McCarthy Athletic Center *Unfinished Business…how to face your failures, overcoming your fears, and reawaken dreams*	KEYNOTE SPEAKER: **Terry Gurno** **Co-founder & CEO** *Gurno Group LLC*
1:15 p.m.	Economic Update	**Dr. Grant Forsyth** **Chief Economist** *Avista Corp*
2:15 p.m.	**BREAK**	
2:30 p.m.	Understanding the Tax Cuts and Jobs Act	**Sam A. Donaldson, JD, LLM** **Law Professor** *Georgia State University College of Law*
4:30 p.m.	SEPC Vice President Closing Remarks	**Kim Weller, CPA/ABV** **Manager – Business Valuations** *Anastasi, Moore & Martin, PLLC*

FACULTY FOR THE SPOKANE ESTATE PLANNING COUNCIL'S 2018 ANNUAL CONFERENCE

JOSEPH (JOE) SMITH

Chief Financial Officer
Gonzaga University

Joe joined Gonzaga in October 2010 as the Associate Vice President for Finance after spending nine years in public accounting with KPMG and Arthur Andersen in Seattle. Joe has been serving as the Chief Financial Officer (CFO) of Gonzaga University since January 2018. As CFO, he oversees accounting and financial record keeping, operating and capital budgets, procurement, treasury (banking, financing, investments), taxation, insurance, emergency preparedness, and risk management, and real estate. Joe also teaches as an adjunct professor in Gonzaga's School of Business Administration and has served on the board of directors for numerous not-for-profit organizations, including the housing arm of Catholic Charities of Spokane, the Washington Society of CPAs, and Early Life Speech and Language. Joe is an alumnus of Gonzaga University and is a Certified Public Accountant (CPA) and Chartered Global Management Accountant (CGMA).

THERESA RODGERS

Vice President and Trust Officer
US Trust, Bank of America Private Wealth Management

Theresa has served in her current role for 13 years, administering trust and investment management accounts, and provides insight into fiduciary matters, wealth preservation, and estate planning. She holds the Certified Trust and Financial Advisor designation and began her career with the bank in 1978 while attending Spokane Falls Community College. Theresa is the current President of the Spokane Estate Planning Council, a Spokane foundation committee member for the Bank of America Charitable Foundation, and enjoys giving back to her community as a volunteer of the Bank of America Volunteer network.

JENNIPHER AMA, RN, CMC

President, Aging Life Care Manager, and Founder
Family First Senior Care, Inc.

As a Registered Nurse and Certified Care Manager, specializing in Critical Care Nursing, Jennipher uses the skills and experience gained over many years working in healthcare and business development to advocate for those in need of additional assistance throughout their continuum of care. Jennipher is committed to ensuring that Family First continues to deliver high quality service as well as providing a great work place for every employee. She has successfully led Family First to being awarded the distinguished Best of Home Care Provider of Choice award for the past eight years. Jennipher is an active member of the Aging Life Care Association™, Home Care Association of America, Washington Home Care Association, Spokane Valley Chamber of Commerce, and the Spokane Estate Planning Council. She served on the board and is the past President of the Washington Home Care Association and is a previous board member for the National Association for Women Business Owner's Northwest chapter.

RHONDA SPANGLER, BASW

Aging Life Care Manager
Family First Senior Care, Inc.

Rhonda earned her Bachelor of Arts in Social Work from the University of Washington. She spent many years working in a hospital setting, providing clinical intake and case management services at an adolescent psychiatric facility in Montana. A relocation to Spokane allowed Rhonda the opportunity to refocus her enthusiasm for another generation in need of advocacy and services through her work at DSHS/ALTCEW. Rhonda's passion for geriatric care management grew out of assisting aging relatives experiencing personal health challenges. She saw firsthand the stress and uncertainty her loved ones faced while interacting with the health care systems. It was then that she became personally invested in assisting our senior population access the necessary resources in order to live out the rest of their lives safely and with dignity

PAUL VIREN,CLU, ChFC, AEP®

President/Owner and Former President of NAEPC
Viren & Associates, Inc.

Owner and president of Viren & 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 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 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 31, 2016. 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 as the President 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 & Associates, Inc., a registered investment advisor and separate entity from LPL Financial.

Paul Viren is registered to transact securities business with residents of the following states: AZ, CA, CO, FL, ID, IL, MT, NV, NY, OH, OR, TX, VA, WA.

VICENTE PINA, AEP®, CLU, ChFC, FLMI, LLIF

Director, Advanced Markets Group
Prudential Financials' Individual Life Insurance

Vicente has nearly 30 years of experience in the financial services industry. He has worked predominately in the development, distribution, and support of life insurance products. Vicente's primary focus at Prudential is Life Insurance Planning for the Ultra Affluent, Strategies for High Net Worth and Foreign National Clients, and Advanced Case Design.

Prior to joining Prudential, Vicente was Director of Member Firm Development for M Financial Group, the largest independent distributor of life insurance in the United States. He previously worked in New York City for TIAA-CREF and AXA, where he was responsible for product development, support, and marketing. Vicente previously worked for LIMRA, where he was Director of Latin America and Director of Development for Asia/Pacific. He started his career with Prudential in 1989. Vicente is a graduate of Bryant University and the Babson College/LIMRA Life Institute Fellow program. He is a Chartered Financial Consultant, Chartered Financial Consultant, Accredited Estate Planner, LIMRA Leadership Institute Fellow, and a Fellow of the Life Management Institute. Vicente and his family reside in the Portland, Oregon, area.

KEYNOTE SPEAKER:
McCarthy Athletic Center, Gonzaga University

TERRY GURNO

Co-Founder and CEO
Gurno Group LLC

As a speaker, trainer, and coach his passion is to inspire leaders to bring out the greatness in those they lead and to help people discover their purpose, ignite their passion, and live an epic life.

Terry spent 20 years as a youth leader in the Pacific Northwest directing youth camps in Western Washington, leading foreign and national mission trips, and motivational speaking.

He was a co-founder of Get Real Assemblies and traveled throughout the United States inspiring and challenging students to make the decisions that would drive their life in the direction they wanted it to go! To this day, Terry has former students who, recognizing his voice, approach him with stories of how a message delivered in a high school gym twenty years ago shaped the path of their life.

In 2005, Terry entered Real Estate, becoming one of the top producers in the office in the first year and was recognized at their national convention for production volume. After one year, Terry was given the opportunity to lead and turn around their failing real estate company. In 4 years as CEO/Team Leader, agent count was increased by 73%, a new business center was opened, and the team had the 2 best years of the company's history. Records were set in listings taken, contracts written, sales closed, owner profit, and profit share—all in a "down market."

Terry's primary focus as Team Leader was recruiting and retaining quality talent, training and skill development, and coaching for productivity and profitability.

DR. GRANT FORSYTH

Chief Economist
Avista Corp.

Before coming to Avista in 2012, he was Professor of Economics at Eastern Washington University from 1999 to 2012. Before EWU, from 1996 to 1999, he worked in the Czech Republic as an academic and private sector economist. He received his BA in Economics from Central Washington University (1988), his MBA in Finance from the University of Oregon (1990), and his PhD in Economics from Washington State University (1996).

He also serves on the Washington Governor's Council of Economic Advisors, The Citizen Commission for the Performance Measurement of Tax Preferences, and the Spokane Mayor's Economic Advisory Roundtable.

SAM A. DONALDSON, JD, LLM

Law Professor
Georgia State University in Atlanta

Sam received his JD from the University of Arizona and LLM (Taxation) from the University of Florida. He is currently a member of the bar in Washington, Oregon, and Arizona. Prior to joining the GSU College of Law in 2012, he was a Professor, Associate Dean, and Director of the Graduate Program in Taxation at the University of Washington. Professor Donaldson is the author and co-author of numerous books on taxation and estate planning, including the popular practitioner treatise, *Price on Contemporary Estate Planning*.

KIM WELLER, CPA/AVB

Manager – Business Valuations
Anastasi, Moore & Martin, PLLC

Kim graduated from Washington State University in 1990 with an emphasis in finance. Kim has numerous years in private and public accounting. She started focusing full-time on business valuation in 2007. Kim is a Certified Public Accountant (CPA) licensed in the state of Washington and is accredited in business valuation (ABV) by the AICPA. She has valued businesses for a variety of purposes, including estate and gift tax planning and reporting, financial reporting, other tax reporting, transaction planning, and litigation purposes. The businesses she has valued include those in the following industries: construction, manufacturing, restaurant/bars, farming, wineries, dealerships, healthcare, telecommunications, and aerospace.

In addition to being a member of the AICPA and WSCPA, Kim serves as Treasurer for Girls on the Run of Spokane County. Kim is also the current Vice President for the Spokane Estate Planning.