



**Agenda for Spokane Estate Planning Council
2019 Annual Seminar
*Planning for Our Clients' Future***

Tuesday, May 14, 2019
Gonzaga University School of Law – Moot Court Room

7:30 a.m. REGISTRATION

8:00 a.m. Welcome **Jacob H. Rooksby, J.D., Ph.D.**
Dean of Gonzaga University School of Law
Gonzaga University

8:15 a.m. SEPC President
Opening Remarks **Kim Weller, CPA/ABV**
Manager – Business Valuations
Anastasi, Moore & Martin, PLLC

8:30 a.m. **Retirement Insights**
Guide to Retirement®
2019 Edition **Katherine Roy, CFP®**
Managing Director, Chief Retirement Strategist
& Head of Individual Retirement
J.P. Morgan Asset Management

9:30 a.m. **Market Insights**
Guide to the Markets®
U.S. | 2Q 2019 | As of April 30, 2019 **Ashley Rose Stumbaugh, CIMA®**
Vice President, Client Advisor, Institutional Advisor
J.P. Morgan Asset Management

10:00 a.m. BREAK

10:15 a.m. **Estate Planning for the 99% of Us**
(For Estates Under \$11.4 Million) **Jordan Rosen, CPA, MST, AEP®**
Director – Estate & Trust Section
Belfint Lyons Shuman

11:45 a.m. SEPC Annual Meeting & Lunch
Gaffney Champions Room – Volkar Center
Gonzaga University Campus **KEYNOTE SPEAKER:**
Dr. Deanna Davis
Author & Professional Speaker
Tour de force Speakers

1:15 p.m. **Adult Protective Services:**
Elder Abuse **Curt Crusch**
APS Program Consultant / Home & Community Services
Aging & Long-Term Support Administration
*Washington State Department of
Social and Health Services*

2:15 p.m. BREAK

2:30 p.m. **Tax Reform:**
The Current State of Affairs
For Individuals & Small Businesses **Adam Sweet, J.D., LL.M.**
Principal
Eide Bailly LLP, National Tax Office

4:30 p.m. SEPC Vice President
Closing Remarks **Monique Corigliano, CPA, CFP®, IAR**
Shareholder, Registered Representative and
Investment Adviser Representative
Richards, Merrill & Peterson, Inc.