**Agenda for Spokane Estate Planning Council**

**2023 Annual Seminar**

Tuesday, May 23, 2023
Hemmingson Center Auditorium
Gonzaga University

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| **8:00 am** | **REGISTRATION / SIGN-IN** |
| 8:00 am | Welcome | **Kristi Bushnell / Andy Hastings****President / Vice President***Spokane Estate Planning Council* |
| 8:15 am | Welcome from Gonzaga University | **Joseph “Joe” Smith***Chief Financial Officer and Treasurer**Gonzaga University* |
| 8:30 am | Generational Estate Planning - Strategies for Preserving the Family Vacation Home | **William Etter, J.D., LL.M***Shareholder, Foster Garvey PC* |
| 9:30 am | National & Regional Economic Outlook | **Grant Forsyth, Ph.D.***Chief Economist, Avista Corp.* |
| **10:30 am –** **10:45 am** | **Break** |
| 10:45 am | Life Settlements and Life Insurance Valuation Solutions for Estate and Tax Professionals | **Jamie Mendelsohn***Executive Vice President, Ashar Group* |
| **11:45 am –** **1:15 pm** | **Lunch Break****Speaker: Mateusz Wolski, Spokane Symphony****SEPC Member Meeting****Ballroom, Hemmingson Center, 3rd Floor** |
| 1:30 pm | Purposeful Trusts and Legacies –5 Simple but Revolutionary Suggestions | **John “John A” Warnick, J.D.***Founder, Purposeful Planning Institute* |
| **2:30 pm –****2:45 pm** | **Break** |
| 2:45 pm | Recent Tax Developments, Including Secure Act 2.0 | **Kevin Sell, C.P.A.***Managing Shareholder, HMA CPA, P.S.* |
| **3:45 pm --****4:00 pm** | **Closing Remarks and Adjournment** |
| 4:00 pm | Happy Hour at Hemmingson Center |  |