FACULTY FOR THE SPOKANE ESTATE PLANNING COUNCIL'S

2017 ANNUAL CONFERENCE

CHARLES J. MURPHY, Vice President for Finance, Gonzaga University, has served in that role since 1985. He is the University's chief financial officer and oversees accounting and financial recordkeeping, operating and capital budgets, purchasing, investments, long term financing, insurance, emergency preparedness & risk management, property acquisition, and campus master planning.

He is also involved with Catholic Charities, serving on their foundation board & finance committee. Mr. Murphy's academic preparation includes graduating from Gonzaga University, 1969-1973, BA in Business Administration, Accounting. His past experiences include being a certified public accountant for Coopers and Lybrand, certified public accountant, 1973-1977; Corporate Controller, private industry, 1977-1978 Gonzaga University, Controller, 1978-1985 Gonzaga University, Vice President for Finance, 1985 to present.

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 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.

DAVID MURRAY, Managing Director of Sterling Foundation Management LLC is a Managing Director at Sterling Foundation Management, a national provider of back-office administration for private foundations, charitable trusts, donor advised funds, and other charitable entities. Dave is responsible for overseeing the sales efforts at Sterling in the Western and Midwestern U.S.

Dave works with a variety of audiences including attorneys, accountants, and financial advisors, primarily on secondary planning for charitable remainder trusts (CRTs), the tax implications of CRTs, and the role CRTs play in the estate and wealth planning of affluent clients.

Dave has been active in philanthropy and charitable planning since 2001 and spends most of his time educating advisors on various planning techniques. He speaks frequently on philanthropy to a range of audiences.

Dave received an undergraduate degree in Civil Engineering and an MBA from Queen's University in Kingston, Ontario and a master's degree in Civil Engineering from the University of Alberta. He is a registered Professional Engineer (non-practicing). Dave has also completed a number of financial services industry courses.

Dave's personal focus is spending time with his wife and two young children. He enjoys tennis, running, biking, skiing, and traveling.

DOUGLAS LODMELL, J.D., LL.M., Lodmell and Lodmell has been practicing in the area of asset protection since 1997. He is the founding member of the ***Asset Protection Council®***, and managing partner and co-founder of Lodmell and Lodmell P.C.. He is recognized as one of the nation's leading providers of asset protection as well as the innovator of **The Bridge Trust®.**

In addition to holding a Juris Doctorate from Cardozo School of Law, Mr. Lodmell holds an advanced law degree (LL.M.) in taxation from NYU School of Law. He has authored numerous articles for professional journals as well as a popular book, now in its 3rd edition, about the explosion of lawsuits in America called ***The Lawsuit Lottery: The Hijacking of Justice in America***.

Doug's extensive experience in asset protection make him a frequent guest speaker at professional conferences and seminars throughout the country, as well as teaching and supporting other attorneys to add asset protection to their practice through the ***Asset Protection Council®*** and through continuing legal education seminars nationwide.

MICHAEL BREJDA, Managing Director, US Trust Portfolio Management is a managing director and a senior portfolio manager at U.S. Trust, Bank of America Private Wealth Management. In this role, he is responsible for determining the appropriate strategy, formulating and implementing investment management and fiduciary services for high net worth clients. He works with a variety of clients by demonstrating the broad range of wealth management services while navigating through changing market environments to provide traditional guidance in the areas of asset allocation, tax-minimization strategies, retirement, and multi-generational strategies from risked based strategies to banking and lending needs.

Prior to joining U.S. Trust, Michael worked as the chief investment officer of Strategic Wealth Management, a private registered investment advisory firm servicing clients throughout the western United States. In addition, he served as the market investment manager for U.S. Bank for Washington and Oregon.

He earned his Master's degree in Finance from the University of Central Oklahoma and a B.A. in Business Administration from Baker University. In addition Michael has spent many years working with various soup kitchens and homeless shelters and is the past President for two different Habitat for Humanity affiliates.

PHILLIP TYLER, (KEYNOTE SPEAKER) Former President Spokane Chapter NAACP and President/Consultant of Wisdom in Words former Air Force law enforcement specialist and Spokane County jail officer, Tyler is building a track record of collaboration and practicality. He took over as president of the NAACP and he's also been an important voice in recent discussions between community groups and the Spokane Police Department.

Beginning his career in the US Air Force as a sergeant and then staff sergeant in charge of various entities, Mr. Tyler has continued to perform in leadership and mentoring roles, has dealt with diverse staff, internal and external stakeholders, and organizational issues throughout his career.

Mr. Tyler has earned numerous accolades throughout his military career, including a Provost Marshall Award. During his tenure with the Spokane Sheriff's Office-Jail Division, he was the first African American to be promoted to sergeant and lieutenant. He was also the recipient of the Trilogy Award from FBI-LEEDA and was the first 'member spotlight' for the FBI-LEEDA Insighter magazine.

J. PATRICK CLUNAN, Manager, the Learning Center Columbia Threadneedle Investments is the program manager of the Learning Center, the value-add resource for Columbia Threadneedle Investments. Mr. Clunan is a member of the Learning Center Speaker Bureau, and has been featured as a keynote speaker at numerous national and regional industry conferences. He is known as an advisor to the advisors. He travels the country working with advisors, clients and other financial professionals, offering education and insight into retirement planning strategies and other in-focus topics. He joined Columbia Threadneedle Investments firms in 2010. He has been a member of the investment community since 2005. Mr. Clunan received his B.A. in business administration from Saint Michael's College. In his free time, Patrick is an avid skier and golfer. He holds the Series 7 and 66 licenses with FINRA.

WENDY S. GOFFE, JD, Partner Stoel Rives LLP has more than 25 years of experience counseling clients on estate planning issues. Her experience includes advising clients on matters including probate and trust administration, estate and gift taxation, charitable giving and nonprofit trusts and corporations, family-owned business succession and issues concerning unmarried couples. Wendy has extensive experience preparing prenuptial, postnuptial and cohabitation agreements.

Wendy is a regular speaker at local, regional and national events addressing a number of estate planning topics. She has also been interviewed by and written for many national publications. Before joining Stoel Rives, Wendy was a shareholder at Graham & Dunn PC and an attorney at Bogle & Gates. Wendy was previously a contributor to Forbes.com.

KELLI FRANCO, CPA, Partner, Moss Adams LLP has been in public accounting since 1993. She provides taxation and financial accounting services to a variety of clients. Kelli also consults on S corporation and LLC issues, structural tax planning, techniques to increase shareholder value, and succession planning.

Kelli leads the firm's Construction, Hospitality, Real Estate, and Professional Services Tax Committee. Kelli sits on the National Construction Financial Management Association Tax Committee and the National Associated General Contractors Tax and Legislative Affairs Committee. She also is a member of the Washington State University Foundation Planned Giving Advisory Board. Her close, hands-on approach to client relationships enables her to effectively and creatively advise clients on a wide range of business matters.

VAL PERRY, CPA, PARTNER, Moss Adams LLP with more than 20 years of tax experience, Val advises closely held companies and business owners and their families on income tax, estate tax, business succession, and ownership transition issues. Val focuses much of her time on food and agriculture businesses, including growers and shippers in the fruit industry. She currently serves as co-chair of the firm's estate tax planning team.