

Financial & Estate Planning Seminar
May 19, 2016

- 8:15 a.m. Registration & Continental Breakfast
- 8:45 – 9:00 **Welcome from WV Bankers Association, WV Society of CPAs, WV State Bar**
- 9:00 – 10:00 **Pernicious Problems and Promising Possibilities for Estate Planners in 2016**
Charles A. “Clary” Redd, Esq., Stinson Leonard Street LLP, St. Louis MO
- 10:00 – 10:10 Break
- 10:10 – 11:00 **Pernicious Problems and Promising Possibilities for Estate Planners in 2016**
- 11:00 – 11:10 Break
- 11:10 – 12:00 **Pernicious Problems and Promising Possibilities for Estate Planners in 2016**
- 12:00 – 12:30 Lunch
- 12:30 – 1:00 **Legislative Update**
Tom Heywood, Esq., Bowles Rice LLP
- 1:00 – 1:15 **Philanthropy WV Initiative – Keep5Local**
Paul Daugherty, EVP of Philanthropy WV
- 1:15 – 2:15 **The New West Virginia Self-Settled Domestic Asset Protection Trust Legislation**
John Allevato, Esq., Spilman Thomas & Battle PLLC
Chris Winton, Esq., Ray, Winton & Kelly PLLC
- 2:15 – 3:00 **Fiduciary Income Tax Issues**
Marlin Witt, CPA, CFP, CGMA, Arnett Carbis Toothman PLLC
- 3:00 – 3:15 Break
- 3:15 – 4:00 **Basic Generation-Skipping Tax**
Marcia Broughton, Esq., Jackson Kelly PLLC
- 4:00 – 5:00 **Panel – Hot Topics and Discussion of Items of Interest to Estate Planners**
John Allevato, Esq., Spilman Thomas & Battle PLLC
David Croft, Esq., Spilman Thomas & Battle PLLC
Laura Ellis, Vice President, BB&T Wealth
John Hussell, Esq., Wooton Wooton & Davis PLLC
J. E. White, Esq., Anspach Meeks Ellenberger LLP
- 5:15 – 5:45 **Reception**
- 5:45 – 6:30 **Dinner and Wine Tasting/Paring with John Brown**
- 6:30 – 7:00 **Wine Auctions and Other Resources - John Brown**