Financial & Estate Planning

May 18, 2017
Edgewood Country Club
Charleston WV

This annual event sponsored by the WV Bankers Association, the WV Society of CPAs and the WV State Bar Probate Law Committee attracts participants from bank trust departments, CPAs, insurance agents, financial planners and attorneys.

Brad Gallant, Day Pitney, LLP

- Power, Money, Sex and Drugs – Elder Law in 21st Century America

It's not just your grandmother's Medicaid – and in fact we'll barely mention Medicaid in this presentation on cutting edge legal issues facing elder law attorneys and other professionals who are serving an increasingly older, and wealthier, population.

At a minimum, every estate planner must understand and be able to address diminished client capacity, adult guardianships, advance health care directives, financial powers of attorney, undue influence and financial exploitation. Moreover, familiarity with long term care insurance, assisted living contracts, social security benefits and pre and post nuptial agreements for seniors is essential for those who represent seniors and advise their families.

Tom Heywood, Esq., Bowles Rice, LLP

- Legislative Update

John Hussell, Wooten, Davis, Hussell & Ellis, PLLC

- Fiduciary Litigation and Mediation

John Allevato, Spilman, Thomas & Battle, PLLC

- Nonjudicial Settlement Agreements under the UTC

J. E. White, Anspach Meeks Ellenberger, LLP

- Discretionary Trust Distributions

Panel Discussion—Hot Topics and Discussion of Items of Interest to Estate Planners
Panelists:

- ***John Allevato, Esq., Spilman Thomas & Battle PLLC***
- ***Marcia Broughton, Esq., Jackson Kelly, PLLC***
- ***Chris Winton, Esq., Ray, Winton & Kelley, PLLC***
- ***Mike Lewis, United Bank Wealth Management***

Stay and join us for the evening session to include dinner, sponsored by The Charleston Estate Planning Council, with Hoppy Kercheval, guest speaker.

Speakers and agenda are subject to change

Financial & Estate Planning Seminar
May 18, 2017

Edgewood Country Club
1600 Edgewood Drive
Charleston WV 25302

(For Directions - www.edgewoodcc.com)

Continuing education credit hours:
- MCLE (Attorneys) - 8.0
- CPE (CPAs) - 8.0
- CE (Insurance) - 8.0
- IMCA - Self-reporting
- CTFA - Self-reporting

Registration Fee: $260.00
$235.00 (Charleston Estate Planning Council Member)
(Registration fee includes continental breakfast, lunch, reception and dinner)

Registration: 8:15 a.m.
Session: 9:00 a.m. - 7:00 p.m.

Cancellation Policy: Full Refund if cancelled on or before 5/5/17
$50 Cancellation fee if cancelled after 5/5/17
No refund on or after 5/12/17 or for no-shows. Substitutions welcome.

To register, go to www.wvbar.org/events. Registration will close on May 15th.
(Payment must be made at time of registration.)

Notice:
There will be no printed material (notebooks) distributed at the seminar. All registrants will receive an email two days prior to the event to access the material. Late registrations will receive a CD at the seminar.

Questions? Contact Amanda Cunningham at acunningham@wvbankers.org

West Virginia Bankers Association
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800-343-8038 or 304-343-8838 www.wvbankers.org