THE ANNUAL ESTATE PLANNING SEMINAR

OCTOBER 24 - 25, 2022 • SEATTLE, WA

EPC
ESTATE PLANNING COUNCIL OF SEATTLE

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WELCOME!

ESTATE PLANNING COUNCIL OF SEATTLE

MISSION: Promote the highest quality estate planning services in the Pacific Northwest—by developing and improving the capabilities of the Council members, fostering cooperation among the professional disciplines in the field, and by familiarizing the public about estate planning matters.

JOIN THE ESTATE PLANNING COUNCIL OF SEATTLE FOR QUALITY FREE TRAINING THROUGHOUT THE YEAR!

Membership Cost: $125

EPC of Seattle membership includes:

- bi-monthly webinars
- 4 quarterly dinner meetings
- networking events

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For contact information see our our website at ***www.epcseattle.org/council/leadership.***

IMPORTANT DETAILS

PREMIER SPONSORS
Special thanks to our premier sponsor.

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MOBILE APP
- Download "Cvent Events" App
- Search for "Estate Planning Seminar"
- Click on "67th Annual Estate Planning Seminar"
- Login with your name and email (used to register)

ANDROID APP APPLE APP

ATTENDANCE REPORTING FORM
Required for all attendees

Attendees MUST report attendance on the Attendance Reporting Form to receive continuing education credit. The form is available online in the Mobile App, and on the seminar website. We will also email a link to it on the final day of the seminar. This is in addition to having to sign in/out on-site, required for many professions.

SIGN-IN/OUT FORMS
Required for many professions

Please sign in/out daily for all professions that require it; this excludes WA attorneys. Please note that this does NOT replace the Attendance Reporting Form.

EVALUATION FORM
The evaluation form is available in the mobile app and a link to the form will be emailed after the Seminar.

WIFI ACCESS
Network: Bell Harbor Conference Center
Password: Belloctober22

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Q&A
Presentation questions can be asked in person or virtually once the session has started and will be open until the end of the seminar day.

FOOD & DRINK
Continental Breakfast and lunch will be available both days in the Harbor Room. Refreshments will be available during the designated break times in the exhibit area.

TOTE BAGS
Tote bags are available at registration while supplies last.

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LANYARDS
Lanyards are available at Registration while supplies last.

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DOOR PRIZES
Please visit participating booths to enter any prize drawings. No purchase necessary to enter.

VIRTUAL ATTENDEE INFO

SEMINAR INFORMATION
Seminar Information will be available in the Attendee Hub until December 31, 2022.

ATTENDEE HUB
Instructions about accessing the Attendee Hub will be emailed to all registrants before the seminar begins. A link will also be available on the seminar website.

ATTENDANCE REPORTING
On-line attendees must still fill out an attendance form. See above for additional information.

MONDAY, OCTOBER 24TH

All sessions occur in Bay Auditorium, unless otherwise noted.
(Map is on page 4)

7:00 AM	REGISTRATION & EXHIBITS OPEN I CONTINENTAL BREAKFAST ATTENDANCE SHEET SIGN-IN FOR SELECTED PROFESSIONS
8:00 AM	**The Forgotten 40 Acres: Using Tax Policy to Fund Reparations** ***Sarah Moore Johnson,*** *Birchstone Moore LLC, Washington DC* ***Raymond C. Odom CFP,*** *The Northern Trust Company, Chicago, IL* ***Phyllis Taite****, Oklahoma City University School of Law, Oklahoma City, OK*
9:30 AM	**Are You Sure You Want to 'Reply All'?** ***John T. Rogers, Jr.****, Rogers Trust Law, Los Angeles, CA*
10:30 AM	BREAK | EXHIBITS Sponsored by Washington Trust Bank Wealth Management & Advisory Services
10:50 AM	**Life Insurance: Still Most Relevant to All Estate Planners** ***Jonathan G. Blattmachr,*** *Pioneer Wealth Partners LLC, New York, NY*
11:50 AM Room: Harbor	LUNCH | EXHIBITS Sponsored by bakertilly now, for tomorrow
12:50 PM	**Washington Probate & Trust Update** ***RoseMary Reed,*** *Stokes Lawrence. P.S., Seattle, WA*
1:50 PM	**Demystifying Distributable Net Income (DNI)** ***Jeremiah W. Doyle IV,*** *BNY Mellon Wealth Management, Boston, MA*
2:50 PM	BREAK | EXHIBITS
3:10 PM	**New Norms in U.S. Trust Law: Is the Grass Greener Outside the Pacific Northwest?** ***M. Read Moore****, McDermott Will & Emery LLP, San Francisco, CA*
4:10 PM	**On the Road Again: Counseling Clients Crossing State Borders** ***Kirsten L. Ambach****, Karr Tuttle Campbell, Seattle, WA* ***Stephanie R. Taylor****, Randall | Danskin, P.S., Spokane, WA*
5:10 PM	ADJOURNMENT

TUESDAY, OCTOBER 25TH

All sessions occur in Bay Auditorium, unless otherwise noted.
(Map is on page 4)

7:00 AM	REGISTRATION & EXHIBITS OPEN I CONTINENTAL BREAKFAST ATTENDANCE SHEET SIGN-IN FOR SELECTED PROFESSIONS
8:00 AM	**Federal Tax Update** ***Samuel A. Donaldson,*** *Georgia State University College of Law, Atlanta, GA*
10:00 AM	BREAK | EXHIBITS
10:15 AM	**When Estate Planning, Marital Agreements and Divorce Collide** ***Wendy S. Goffe,*** *Stoel Rives LLP, Seattle, WA* ***Peter M. Walzer,*** *Walzer, Melcher & Yoda, Los Angeles, CA* ***Kimberly R. Willoughby****, Willoughby & Associates, Denver, CO*
11:15 AM	**Donor Advised Funds and Private Foundations: Choosing the Best Charitable Giving Strategy** ***Crystal Thompkins, CAP®, CSPG,*** *BNY Mellon Wealth Management, Greensboro, NC*
12:15 PM Room: Harbor	LUNCH | EXHIBITS
1:15 PM Room: Bay	**Upcoming Changes to the ACTEC Commentaries and National Trends in Estate Planning Ethics Cases** ***Karen E. Boxx****, University of Washington School of Law, Seattle, WA*
1:15 PM Room: Harbor	**2022 Oregon Law Update** ***Melissa May,*** *Duffy Kekel LLP, Portland, OR*
2:15 PM	BREAK | EXHIBITS
2:25 PM Room: Bay	**Will Your SLAT Fit the Right Slots?** ***James M. Kane,*** *KaneTreadwell Law, Atlanta, GA*
2:25 PM Room: Harbor	**Fiduciary Duties and Sustainable Investing: What Works and Why** ***Susan N. Gary,*** *University of Oregon School of Law, Eugene, OR*
3:25 PM	BREAK | EXHIBITS
3:35 PM Room: Bay	**Estate Planning Paralysis: Getting Your Clients to Act** ***Justin Miller, J.D., LL.M., TEP, AEP®, CFP®,*** *Evercore Wealth Management, San Francisco, CA*
3:35 PM Room: Harbor	**Electronic Wills: Advising Clients and Avoiding Potential Pitfalls** ***Catherine N. L. Connell,*** *K&L Gates LLP, Seattle, WA*
4:35 PM	ADJOURNMENT

ACCREDITATION

AMERICAN BANKERS ASSOCIATION (ABA)

ABA Professional Certifications has approved the 67th Annual Estate Planning Seminar for:

- 18.25 CTFA, 5 CCTS credit.
- APPROVED NON-ABA CE search for training will appear as: Estate Planning Council of Seattle | 67th Annual Estate Planning Seminar

ATTORNEY

The number of credits earned depends on which sessions are attended. The seminar website and mobile app include the most up to date information. Credits for additional states may be available. Please ask on-site at the Accreditation Station for additional information.

Washington

The WSBA has approved the seminar for 14 Law and Legal credits, 2 Ethics and 1.5 General credits for live, virtual and on-demand sessions.

Oregon

The OSBA has approved the seminar for 15.5 general session credits (live and recorded).

Idaho

15.5 CLE Credits (including 2 ethics credits)

Montana

14.5 CLE Credits (including 2 ethics credits) for live and virtual sessions only.

Ethics Sessions (for all states)

- Are You Sure You Want to 'Reply All'?
- Upcoming Changes to the ACTEC Commentaries and National Trends in Estate Planning Ethics Cases

CERTIFIED PROFESSIONAL GUARDIANS (WASHINGTON)

The 67th Annual Estate Planning Seminar has been approved for 14 general credits, 2 ethics credits, and 1.5 emerging issues (cultural diversity).

CPA

Oregon and Washington

14.5 CPE credits available for in-person attendees only.

This seminar will comply with the CPA rules for accreditation, although it is not qualified for ethics CPE credits.

PARALEGALS

17.5 CLE credits for Washington State paralegals are available for in-person, virtual and on-demand sessions.

CERTIFIED FINANCIAL PLANNER® PROFESSIONALS

The following CE programs have been accepted by the CFP Board.

Program Name	Program ID	Hours Granted
The Forgotten 40 Acres: Using Tax Policy to Fund Reparations	306249	1.5 hours
Are You Sure You Want to 'Reply All'?	306232	1 hour
Life Insurance: Still Most Relevant to All Estate Planners	307193	1 hour
Washington Probate & Trust Update	306248	1 hour
Demystifying Distributable Net Income (DNI)	306247	1 hour
New Norms in U.S. Trust Law: Is the Grass Greener Outside the Pacific Northwest?	306260	1 hour
On the Road Again: Counseling Clients Crossing State Borders	306257	1 hour
Federal Tax Update	306256	2 hours
When Estate Planning, Marital Agreements and Divorce Collide	306769	1 hour
Donor Advised Funds and Private Foundations: Choosing the Best Charitable Giving Strategy	306979	1 hour
2022 Oregon Law Update	306255	1 hour
Upcoming Changes to the ACTEC Commentaries and National Trends in Estate Planning Ethics Cases	307275	1 hour
Will Your SLAT Fit the Right Slots?	306284	1 hour
Fiduciary Duties and Sustainable Investing: What Works and Why	306253	1 hour
Estate Planning Paralysis: Getting Your Clients to Act	306656	1 hour
Electronic Wills: Advising Clients and Avoiding Potential Pitfalls	307462	1 hour

SPONSORS & EXHIBITORS

BOOTH NUMBER

21

Andrew Jones Auctions
andrewjonesauctions.com

Andrew Jones Auctions is full-service fine art and antiques auction house with an understanding of market trends and foresight for the 2st century. The staff have a wealth of knowledge with international experience and offer sales that are diverse, eclectic and fun, featuring items from antiquity to modern design.

Contact:
Jena Lee
503.999.1937
jenalee@andrewjonesauctions.com

1

BakerTilly
bakertilly.com

Baker Tilly US, LLP (Baker Tilly) is a top ten advisory, tax and assurance firm dedicated to building long-lasting relationships with our clients, our communities and each other.

Contact:
Kate Anderson
206.613.7170
kate.anderson@bakertilly.com

Thank you for sponsoring: Day 1 Lunch & Session Live Feed

6

BANK OF AMERICA PRIVATE BANK
privatebank.bankofamerica.com

Bank of America Private Bank delivers complete investment and wealth planning solutions to ultra-high-net-worth clients and families. Through highly personalized, team-based service, we offer clients the insights and guidance to help protect their wealth for generations to come.

Contact:

Brian Wineke, CIMA®
Managing Director, Market Executive

Phone: (206) 358-6810
Email: brian.e.wineke@bofa.com

BOOTH NUMBER

16

BECU Trust Services
becu.org/trust

BECU Trust Services provides full-service trust administration, from revocable living trusts to the more complex special needs trusts, estate administration, wealth management, and independent investment advisory services. Our experienced, credentialed team offers local, personalized service, and competitive, fair rates. We are ready to meet with you and your clients.

Contact:
BECU Trust Services
Phone: 206-812-5176
Email: becutrust@becu.org

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19

Bonhams
bonhams.com/seattle

Bonhams is a privately owned international auction house. Founded in 1793, it is one of the world's largest and most renowned auctioneers of fine art and antiques, motor cars and jewelry. Bonhams Trusts & Estates team assists fiduciaries with a variety of services including appraisals, auction sales, collection management.

Contact:
Heather O'Mahony
206.218.5011
heather.omahony@bonhams.com

14

The Bryn Mawr Trust Company of Delaware
bmt.com/wealth/delaware

The Bryn Mawr Trust Company of Delaware serves as a Delaware corporate fiduciary and administrative trustee under the full spectrum of tax advantaged Delaware solutions contemplated by attorneys and advisers throughout the United States. We support all of Delaware's laws and statutes addressing personal trusts and estate planning; business and institutional trusts, holding companies; captive domicile entities; and alternative business entities.

Contact:
Bryan Andersen
302.792.1408
bandersen@bmt.com

BOOTH NUMBER

18 **Family Resource Home Care**
familyresourcehomecare.com

In home-care is more that a service we provide, it's a connection we feel. Family Resource focuses in on the details that make life special for our clients. We provide personal care services through our dedicated caregivers all with commitment and kindness.

Contact:
Laura Henrichs
206-545-1092
laurah@familyrhc.com

10 FERGUSON WELLMAN **Ferguson Wellman Capital Management**
fergusonwellman.com

Founded in 1975, Ferguson Wellman Capital Management, and its division West Bearing Investments, is a privately owned registered investment adviser, established in the Pacific Northwest. As of January 1, 2022, the firm manages $8.2 billion for 913 clients, including individuals and families, union and corporate retirement plans and foundations and endowments.

Contact:
Chris Bixby
425.658.0731
chris.bixby@fergwell.com
Thank you for being our AV Sponsor.

2 **Guide Dogs for the Blind**
guidedogs.com

At Guide Dogs for the Blind, we believe that everyone deserves to move through the world safely and confidently—to live the life they want to live. That's why we harness the power of partnerships to connect people, dogs, and communities to transform the lives of individuals with visual impairments.

Contact:
Erin Jones
415.499.4456
ejones@guidedogs.com

BOOTH NUMBER

12 **Heifer Foundation**
myheiferfoundationgiving.org

Heifer Foundation's mission is to raise and oversee financial assets to support Heifer International's work. The Foundation has been Heifer's global partner for more than 25 years. While donations to Heifer are put to immediate use, gifts made to Heifer Foundation are invested for the future.

Contact:
Debbie McCullough, Esq
702.355.0324
debbie.mccullough@heiferfoundation.org

3 **InterActive Legal**
interactivelegal.com

Estate Planning and Elder Law professionals turn to InterActive Legal as their main resource for the latest planning strategies. We provide the most comprehensive productivity system on the market with an easy-to-use document drafting system, extensive continuing education, thought-provoking discussion forums, and more.

Contact:
Lisa Briley
469.892.5036
lbriley@interactivelegal.com

5 **Laird Norton Wealth Management**
lairdnortonwm.com

For more than five decades, Laird Norton Wealth Management has served as long-term partners for exceptional individuals, families and foundations wanting to achieve their greatest impact through their investments, legacy planning and philanthropy. As both an RIA and trust company, the firm offers the full spectrum of wealth planning, investment management, family business advisory and trust & estate services, in a deeply personal, exceptionally skillful manner that advances the aspirations and long-term financial interests of clients. Combined with Wetherby Asset Management, the firm has more than $15 billion in assets under management and the unparalleled expertise that comes with being part of a seventh-generation family enterprise.

Contact:
Debra Smiley, CTFA
800.426.5105
d.smiley@lnwm.com

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LASHER HOLZAPFEL SPERRY & EBBERSON **Lasher Holzapfel Sperry & Ebberson**
lasher.com

Founded 48 years ago in Seattle, Lasher Holzapfel Sperry & Ebberson provides comprehensive legal services for private and family businesses, their owners and families, as well as for executives of publicly held corporations. Areas of practice include business and tax law, estate planning, probate and related litigation, divorce and family law, general civil litigation, creditors' rights and bankruptcy, employment law, and real estate law. Whether you need basic or advanced estate and tax planning, succession planning for companies, probate or trust administration, the Lasher team is ready to listen and help, strategically navigating complicated legal issues with personalized client services, guiding the decisions of individuals and privately held companies.

Contact:
Marcy W. Salo
206.654.2481
salo@lasher.com
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22 **Legal Foundation of WA**
legalfoundation.org

The Endowment for Equal Justice is the nation's largest legal aid endowment helping to provide funds for legal representation on issues such as preventing homelessness, navigating family law issues, and helping veterans and seniors resolve issues.

Contact:
Melinda Mann
2063839876
melinda@legalfoundation.org

13 **Murano Senior Living**
leisurecare.com/ourcommunities/murano-seniorliving

Bring your retired life to life at Murano Senior Living, an active retirement community for adults 55+. Ideally located in First Hill, our 24-story community offers a continuum of care services, including independent living, assisted living, and memory care. Here, you won't find buy-in fees or long-term contracts, but you will find resort-style amenities such as gourmet dining, a dynamic social calendar, a rooftop bar, and a warm and welcoming staff. It's time to have the time of your life!

Contact:
Pam McFadden, CPASE
206.450.3644
pmcfadden@leisurecare.com

BOOTH NUMBER

15 **National Care Advisors**
nationalcareadvisors.com

NCA is focused on improving the quality of life for our clients and families, within the scope of all available funding resources and third-party benefits. A team approach to planning for individuals with special needs, including family, financial, legal, and care and quality of life expertise is essential to provide the best results for our clients.

Contact:
Karen Kozak
480.285.8490
kkozak@nationalcareadvisors.com

8 **NCF Northwest**
ncfgiving.com/northwest/

National Christian Foundation (NCF) provides innovative giving solutions for Christian families and their advisors. NCF is an industry leader in accepting non-cash, appreciated assets such as stocks, real estate, and business interests, which help givers save taxes, send more to ministry, and align their charitable goals with their family, business, estate, and legacy plans.

Contact:
Dana Rekow
206.441.5199
drekow@ncfgiving.com

17 P **Phillips**
phillips.com

Phillips is the destination for international collectors to buy and sell the world's most important twentieth-century and contemporary works of art, design, jewels, watches, photographs and editions. Phillips is comprised of specialists from auction houses, museums, galleries and other arts institutions. Besides conducting auctions in our New York, London, Hong Kong and Geneva salerooms, we hold private sales and selling exhibitions. We also consult with museums, advise private estates and corporate clients, and offer valuations and other financial services.

Contact:
Silvia Coxe Waltner
206-604-6695
scwaltner@philliis.com
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7 **Seattle Foundation**
seattlefoundation.org

Seattle Foundation, a premium service provider, knows how to identify the best solutions for your clients through our customized Donor Advised Fund service levels. We also specialize in integrating philanthropy into an estate plan, accepting gifts of complex assets, and private foundation conversions.

Contact:
Cheryln Cloy
206.622.2294
c.cloy@seattlefoundation.org
Thank you for being our App Sponsor.

11 **South Dakota Trust**
sdtrustco.com

With currently more than $126 billion in assets under administration, South Dakota Trust Company LLC (SDTC) offers pure trust administration without any product, working with whomever the client/advisor wishes regarding investments, insurance and custody. As a result of South Dakota's unique trust, tax, asset protection and privacy laws, we work with families all over the globe, serving as trustee as well as corporate and/or trust agent for family-owned South Dakota regulated Private Trust Companies. SDTC's affiliate company, SDTC Services LLC, also provides superior services for unregulated Private Family Trust Companies in Nevada and Wyoming.

Contact:
Will Murphy
212.642.8377
wmurphy@sdplanco.com

9 **Washington Trust Bank**
watrust.com

For over a century, Washington Trust Bank has provided banking, trust and wealth management services to individuals, nonprofit organizations, and businesses throughout the Pacific Northwest. We are the oldest and largest privately-held commercial bank in the region, offering sophisticated administration of assets through our Wealth Management & Advisory Services team.

Contact:
Matt Tilghman-Havens
206.576.6215
mthavens@watrust.com
Thank you for being our Day 1 Break Sponsor.

BOOTH NUMBER

20 **WE Trust Company**
wetrustco.com

WE Trust Company is a team of professional fiduciaries dedicated to delivering peace of mind to our clients. We serve in the following capacities: Personal Representative, Trustee, Agent under Durable Power of Attorney, Family Office Administrator. Established in 1997, WE Trust Company is a Washington State Chartered Trust Company.

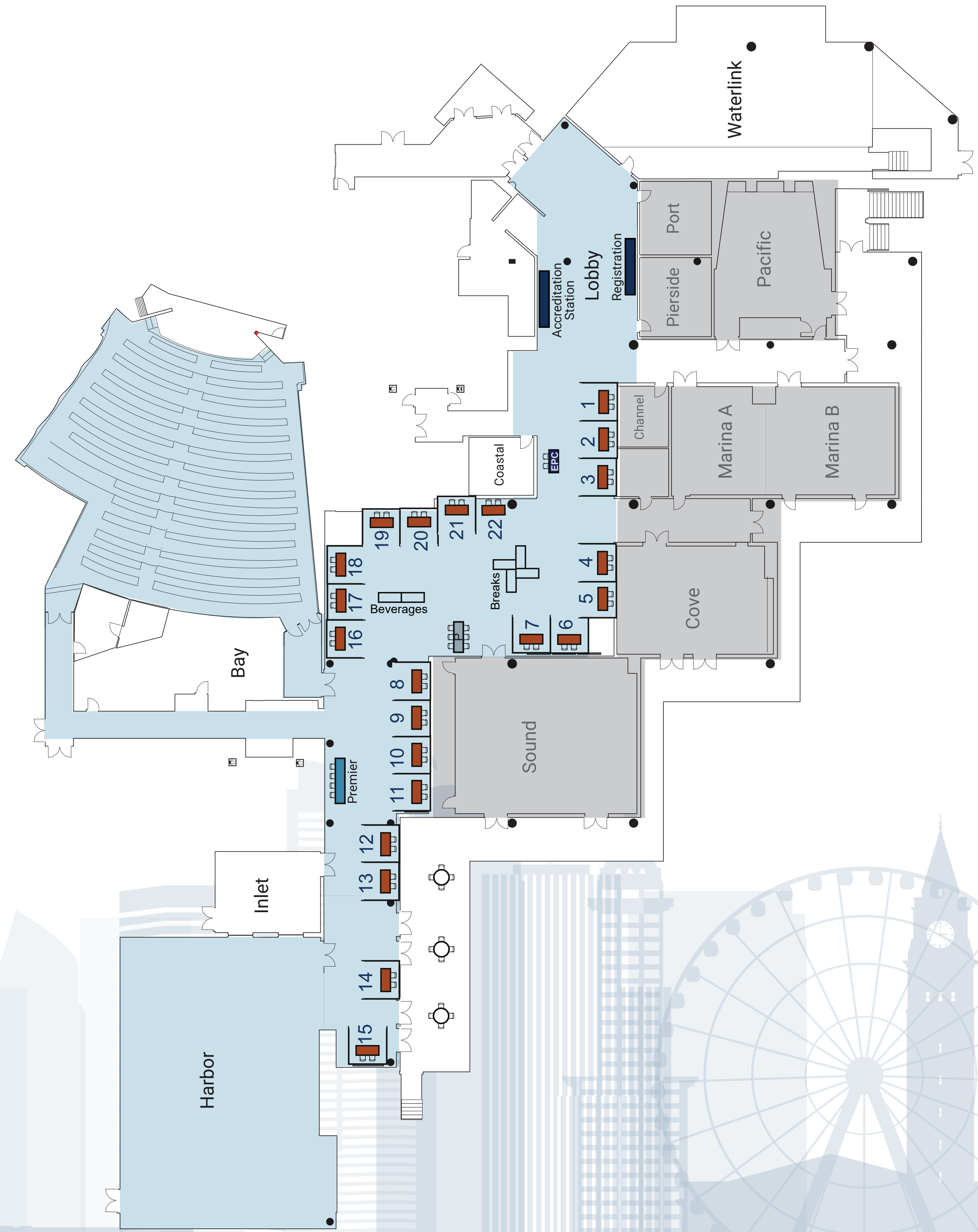
Contact:
Carolyn Schaefer, J.D.
206.781.6997
carolyn@wetrustco.com
Thank you for being our Tote Bag Sponsor.

4 **Whittier Trust Company**
whittiertrust.com

Since 1935, Whittier Trust has helped highly affluent families accomplish what's important to them. We invest time to understand our clients' circumstances and goals and then tailor our comprehensive wealth management services -- investment management, and fiduciary, philanthropic and real estate services, all within the structure of a multi-family office.

Contact:
Nick Momyer
206.834.1384
nmomyer@whittiertrust.com

EVENT MAP



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