THE ANNUAL ESTATE PLANNING SEMINAR

NOVEMBER 6-7, 2023 • SEATTLE, WA

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EPC

ESTATE PLANNING COUNCIL OF SEATTLE

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

SEMINAR COMMITTEE

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BNY Mellon

Co-Chair
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Baker Tilly US, LLP

EPC OF SEATTLE BOARD OF DIRECTORS & STAFF

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

IMPORTANT DETAILS

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: Westin_Conference

Password: EPC2023

Sponsored by Seattle Foundation

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
Breakfast buffet and lunch will be available both days in the Grand Ballroom. Refreshments will be available during the designated break times in the exhibit area.

Breakfast buffet sponsored by AltaView Advisors, LLC and U.S. Bank Private Wealth Management

Espresso Cart sponsored by NCF Northwest and Fedelta Home Care.

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

Sponsored by Andrew Jones Auctions

LANYARDS
Lanyards are available at Registration while supplies last.

Sponsored by Interactive Legal

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

MOBILE APP
- Use the QR code to download the “Cvent Events” App
- Search for “Estate Planning Seminar”
- Click on “68th Annual Estate Planning Seminar”
- Login with your name and email (used to register)

VIRTUAL ATTENDEE INFO

SEMINAR INFORMATION
Seminar Information will be available in the Attendee Hub until December 31, 2023.

ATTENDEE HUB
All virtual and on-demand sessions will be found on Attendee Hub. Instructions about accessing the Attendee Hub will be emailed to all virtual attendees before the seminar begins. Instructions for all in person attendees will be emailed at the conclusion of the event. 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.

MANY THANKS TO OUR FACULTY DINNER SPONSOR: BRYN MAWR TRUST COMPANY OF DELAWARE

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MONDAY, NOVEMBER 6TH

All sessions occur in the Grand Ballroom.
(Map is on page 11)

7:30 AM	REGISTRATION & EXHIBITS OPEN I BREAKFAST BUFFET ATTENDANCE SHEET SIGN-IN FOR SELECTED PROFESSIONS Breakfast Sponsored by ALTAVIEW ADVISORS Business Valuation and Real Estate Appraisal Services
8:30 AM	**Federal Tax Update** ***Samuel A. Donaldson,*** *Georgia State University College of Law*
10:30 AM	BREAK | EXHIBITS | ESPRESSO CART Sponsored by Washington Trust Bank Sponsored by National Christian FOUNDATION Northwest
10:45 AM	**Prudent Investing: From Legal Lists to Cryptocurrency** ***Erica E. Lord,*** *Chief Fiduciary Officer, BNY Mellon Wealth Management*
11:45 AM	**So, You Want to Give Us Your Picasso?** ***William F. Grady IV, J.D., CLU®, CFP®,*** *Director, Baker Tilly* ***Joe Baratta,*** *SVP, Head of Trusts & Estates, Western Region, Bonhams*
12:45 PM	LUNCH | EXHIBITS
1:45 PM	**Gifts that Keep on Giving: Form 709 Ethics Landmines** ***Stephanie Loomis-Price****, Perkins Coie LLP* ***Christine Wakeman,*** *Winstead, P.C.*
2:45 PM	BREAK | EXHIBITS | ESPRESSO CART Sponsored by Fred Hutch Cancer Center Sponsored by National Christian FOUNDATION Northwest
3:00 PM	**Post-Mortem Estate Planning** ***Jeremiah W. Doyle IV,*** *SVP, BNY Mellon Wealth Management*
4:00 PM	NETWORKING RECEPTION WITH EXHIBITORS Sponsored by BNY MELLON WEALTH MANAGEMENT

TUESDAY, NOVEMBER 7TH

All sessions occur in the Grand Ballroom.
(Map is on page 11)

7:30 AM	REGISTRATION & EXHIBITS OPEN I BREAKFAST BUFFET ATTENDANCE SHEET SIGN-IN FOR SELECTED PROFESSIONS Breakfast Sponsored by US Private Wealth Management U.S. Bank
8:30 AM	**The New Normal for Charitable Tax Planning** ***Justin Miller J.D., LL.M., TEP, AEP®, CFP®*** *Partner and National Director of Wealth Planning and Managing Director* *Evercore Wealth Management and Evercore Trust Company*
9:30 AM	**Washington Probate and Trust Law Update** ***Anna M. Cashman,*** *KHBB Law PLLC*
10:30 AM	BREAK | EXHIBITS | ESPRESSO CART Sponsored by Northwest Trustee & Management Services Sponsored by Fedelta Home Care
10:45 AM	**Should I Stay, or Should I Go?** ***Susan Queary, CPA,*** *Baker Tilly US, LLP* ***Ryan Bray, CPA,*** *Baker Tilly US, LLP* ***Liz Arnold, CPA,*** *Baker Tilly US, LLP*
11:45 AM	**The CTA: Coming to a Family Entity Near You** ***Nancy G. Henderson****, Henderson, Caverly & Pum LLP*
12:45 PM	LUNCH | EXHIBITS
1:45 PM	**Problematic Provisions in Prenuptials, Settlement Agreements** ***Wendy S. Goffe,*** *Stoel Rives LLP*
2:45 PM	BREAK | EXHIBITS | ESPRESSO CART Sponsored by Fedelta Home Care
3:00 PM	**Estate Planning for Nonresidents and Noncitizens** ***Michael Rosen-Prinz,*** *Loeb & Loeb LLP*
4:00 PM	**You're Fired! Can You Really Fire Clients?** ***Bruce Stone,*** *Shareholder, Goldman Felcoski & Stone P.A.*
5:00 PM	ADJOURNMENT

ACCREDITATION

AMERICAN BANKERS ASSOCIATION (ABA)

ABA Professional Certifications has approved the 68th Annual Estate Planning Seminar for:

- 20 CTFA, 1.25 CCTS, CRSP, and CISP credit.
- APPROVED NON-ABA CE search for training will appear as: Estate Planning Council of Seattle | 68th Annual Estate Planning Seminar

ATTORNEY (CLE)

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 for in-person, live and pre-recorded sessions.

Live Activity # 1248843

Recorded Activity # 1248845

Oregon

The OSBA has approved the seminar for 15 general session credits (live and recorded) and 1 ethics credit (You're Fired! Can You Really Fire Clients?)

ID#255729

Idaho

The course has been approved for Idaho MCLE credit.

Course Number: 23-3831

Total Credits Approved: 13 (including 2 ethics credits)

Ethics Sessions (Washington & Idaho)

- Gifts that Keep on Giving: Form 709 Ethics Landmines
- You're Fired! Can You Really Fire Clients?

CERTIFIED PROFESSIONAL GUARDIANS (CPGC)

Washington

The 68th Annual Estate Planning Seminar has been approved for 14 general credits, 2 ethics credits.

CPA

Oregon and Washington

13 CPE credits available for in-person and live 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® (CFP) PROFESSIONALS

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

Program Name	*Program ID*	*Hours Granted*
Federal Tax Update	317490	2
Prudent Investing: From Legal Lists to Cryptocurrency	317491	1
So, You Want to Give Us Your Picasso?	317492	1
Gifts that Keep on Giving: Form 709 Ethics Landmines	317494	1
Post-Mortem Estate Planning	317497	1
The New Normal for Charitable Tax Planning	317500	1
Washington Probate & Trust Update	317501	1
Should I Stay, or Should I Go?	317502	1
The CTA: Coming to a Family Entity Near You	317503	1
Problematic Provisions in Prenuptials, Settlement Agreements	317504	1
Estate Planning for Nonresidents and Noncitizens	317505	1
You're Fired! Can You Really Fire Clients?	317507	1
Oregon Update	317509	1
Life Settlements and Life Insurance Valuation Solutions for Estate and Tax Professionals	317510	1
Gifts Avoid WA Estate Tax? Not So Fast	317512	1

SPONSORS & EXHIBITORS

To find contact info for all exhibtors visit the event app!

BOOTH NUMBER

13

AltaView Advisors, LLC
altaviewadvisors.com

AltaView was founded by a team of seasoned valuation professionals that offer a unique combination of large firm expertise and boutique firm specialization and service. Our primary mission is to consistently provide best-in-class valuation services performed directly by highly experienced professionals. AltaView prides itself on focused senior-level attention, providing defensible reports that are thorough yet comprehensible, and timely results that meet or exceed our clients' expectations.
Thank you for being a Breakfast Sponsor.

22

Andrew Jones Auctions
andrewjonesauctions.com

Andrew Jones Auctions is a full-service fine art and antiques auction house with an understanding of market trends and foresight for the 21st century. The staff possess a wealth of knowledge with international experience and offer sales that are diverse, eclectic, and fun, featuring items from antiquity to modern design.
Thank you for being our Tote Bag Sponsor.

Baker Tilly US, LLP
bakertilly.com

Baker Tilly US, LLP (Baker Tilly) is a leading advisory CPA firm, providing clients with a genuine coast-to-coast and global advantage in major regions of the U.S. and in many of the world's leading financial centers - New York, London, San Francisco, Los Angeles and Chicago. Baker Tilly is an independent member of Baker Tilly International, a worldwide network of independent accounting and business advisory firms in 145 territories, with 41,000 professionals and a combined worldwide revenue of $4.7 billion.
Thank you for being a Premier Sponsor.

9

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 a highly personalized, team-based service, we offer clients the insights and guidance to help protect their wealth for generations to come. As the largest provider of personal trust and fiduciary administration in the U.S., we were recently recognized as the Best Private Bank in North America. We've also earned distinction for our customer service, succession planning and use of technology to improve the client experience.

BOOTH NUMBER

1

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 us today.
Thank you for being a Premier Sponsor.

BNY Mellon
bnymellon.com

Thank you for being our Networking Social sponsor

7

Bonhams
bonhams.com/location/PNW/pacific-northwest/

Founded in 1793, Bonhams is one of the world's largest and most renowned auctioneers, offering fine art and collectables, motorcars and a luxury division, including jewellery, watches, wine and whisky. The main salerooms are in London, New York, Los Angeles, Paris and Hong Kong, with auctions also held in Knightsbridge, Edinburgh and Sydney. With a worldwide network of offices and regional representatives in 22 countries, Bonhams offers advice and valuation services in 53 specialist areas.

24

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 advisors 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.
Thank you for being our Faculty Dinner Sponsor.

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15

D.A. Davidson Trust Company
dadavidson.com

D.A. Davidson Trust Company offers personal trust, investment management and retirement services for individuals, businesses and institutional clients with a focus on helping clients meet their financial objectives.

20

Endowment for Equal Justice
legalfoundation.org

The Endowment for Equal Justice (EEJ) raises, invests, and contributes sustainable funds to resolve the civil legal aid challenges facing Washington families and to change systems and policies that perpetuate poverty and racial, social, and economic injustice. The EEJ is the largest endowment in the country specifically dedicated to civil legal aid.

11

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.

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Fedelta HOME CARE We Take Care of Family

Fedelta Home Care
fedeltahomecare.com

Since 2004 Fedelta Home Care has been the leading provider of Private Home Care in the Pacific Northwest. Our experienced and compassionate caregivers provide a wide range of services from companion care to end of life support. Fedelta proudly serves King, Pierce, Snohomish Counties, and are excited to announce our new Portland branch. Fedelta is known for being very responsive and often starting care within hours of the first phone call. Fedelta shows appreciation to our clients by offering shorts shifts, maintaining competitive rates, eliminating restrictive contracts, and offering a very flexible shift cancellation policy. We accept Private Pay, Long Term Care Insurance, and Medicaid. At Fedelta we believe in providing Exceptional Service-No Exceptions.

Fedelta Home Care-We Take Care of Family!

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BOOTH NUMBER

2

FERGUSON WELLMAN

Ferguson Wellman
fergusonwellman.com

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18

Fred Hutch Cancer Center

Fred Hutchinson Cancer Center
fredhutch.org

Fred Hutchinson Cancer Center unites comprehensive care and advanced research to provide the latest cancer treatment options and accelerate discoveries that prevent, treat and defeat cancer and infectious diseases worldwide.

Thank you for being a Break Sponsor.

6

Fruitcocktail Estate Sales Appraisals
fruitcocktailcollectables.com

Estate appraisals for personal property for estate tax, art appraisals, antiques, + general / Estate Sales / Brokering

8

Guide Dogs for the Blind
guidedogs.com

Guide Dogs for the Blind (GDB) empowers lives by creating exceptional partnerships between people, dogs, and communities. We envision a world with greater inclusion, opportunity, and independence. GDB is the largest guide dogs school in North America serving approximately 2,000 clients annually throughout the US and Canada. Since 1942, we have partnered more than 16,000 people with guide dogs.

HELSELL FETTERMAN

Helsell Fetterman LLP
helsell.com

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3

InterActive Legal

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.

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BOOTH NUMBER

5

Laird Norton Wealth Management

lairdnortonwm.com

For more than five decades, Laird Norton Wealth Management (LNWM) 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. Comprised of an RIA (registered investment advisor) and two trust companies (in Washington State and South Dakota), LNWM is able to offer 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 nearly $14 billion in assets under management and the unparalleled expertise that comes with being part of a seventh-generation family enterprise.

Lasher Holzapfel Sperry & Ebberson

lasher.com

Founded 49 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.

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4

National Care Advisors

nationalcareadvisors.com

Founded, owned and staffed by nursing professionals, National Care Advisors is wholly focused on achieving optimal and sustainable quality of life for all. We have served individuals with complex care needs since 2008, offering: Life care planning Quality of life assessment Third party benefit analysis Education consulting Case management Combining genuine compassion with practical experience, we know how to balance immediate needs and lasting sustainability, embracing families' unique visions while adapting to their current situations.

BOOTH NUMBER

12

NCF Northwest

ncfgiving.com/northwest

National Christian Foundation (NCF) provides innovative giving solutions for Christian families and their advisors. Comprised of some of the brightest, most passionate experts in charitable giving today, our team helps people create a well-planned, intentional strategy for their giving so they can inspire their family, maximize resources, and leave a lasting legacy. 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. Our team of giving experts at NCF welcome the opportunity to come alongside you in serving your clients with the most creative and tax-saving charitable solutions available today.

Thank you for being a Coffee Cart Sponsor.

17

Northwest Trustee & Management Services

nwtrustee.com

Northwest Trustee & Management Services, LLC, is a state chartered trust company that provides professional management services for trusts, estates, agency accounts, limited liability companies and family foundations. Founded over 30 years ago, Northwest Trustee operates throughout the Northwest with offices in Spokane, Olympia and Boise. As one of the few non-bank trust companies, they specialize in managing trusts and estates with complex assets and complicated family situations.

Thank you for being a Break Sponsor.

23

Seattle Children's

seattlechildrens.org

For more than 100 years, Seattle Children's Hospital has specialized in meeting the unique physical, emotional and developmental needs of children from infancy through young adulthood. We're united by a compelling mission: We provide hope, care and cures to help every child live the healthiest and most fulfilling life possible.

SPONSORS & EXHIBITORS

BOOTH NUMBER

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 funds-Family Foundation, Community Philanthropy Fund, or Corporate Foundation, for example, to integrating philanthropy into an estate plan, to accepting gifts of complex assets.
Thank you for being our Wi-Fi Sponsor.

10

South Dakota Trust LLC
Sdplanco.com

With currently more than $140 billion in assets under administration, South Dakota Trust Company LLC (SDTC) offers pure trust administration without any product, working with whomever the client or advisor wishes regarding investments, insurance and custody. As a result of South Dakota's unique trust, asset protection and tax 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 of Wyoming LLC, and SDTC Services of Nevada LLC, also provides superior services for unregulated Private Family Trust Companies in Wyoming & Nevada.

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University of Washington, Office for Planned Giving
washington.edu/giving/how-to-give/planned-giving

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U.S. Bank Private Wealth Management
usbank.com

We have offices through out eastern and western Washington. We support the wealth goals of individuals and families. We work with a wide range of clients, with varying life experiences and backgrounds. Or offices have deep experience in working with business owners, tech entrepreneurs, doctors and retirees; however, we are able to advise regarding many unique needs or situations. We have a full trust team located in WA to help administer special needs trusts, trusts with real estate and other irrevocable trusts.
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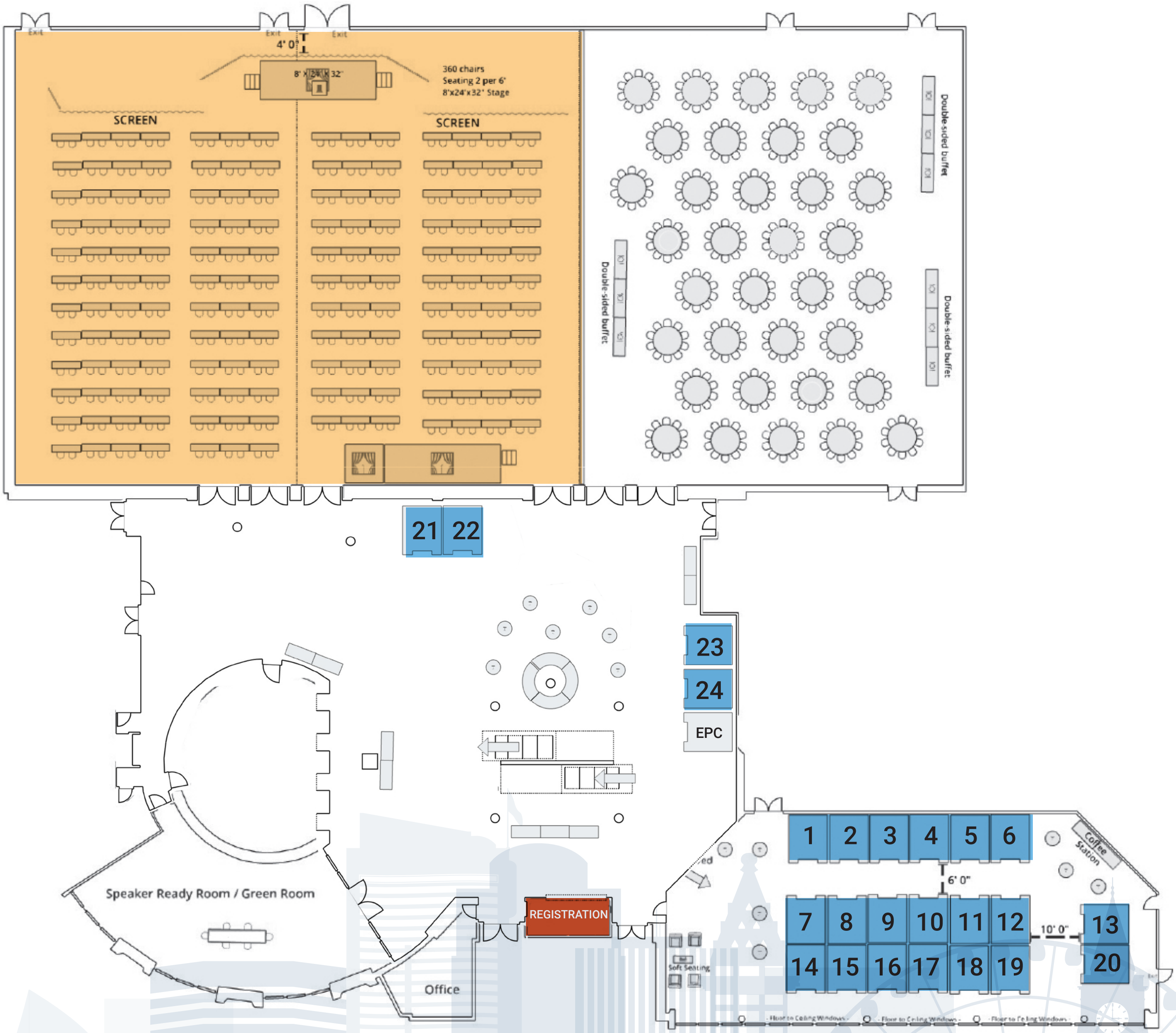
BOOTH NUMBER

21

Washington Trust Bank
watrust.com

Since 1902, Washington Trust Bank has provided wealth management services to individuals, organizations, businesses and professionals throughout the Northwest. Today, with more than 40 offices and over 1200 employees throughout Washington, Idaho and Oregon, our Wealth Management & Advisory Services division serves individual, nonprofit and business clients with administration of assets in the billions of dollars. Our success is the direct result of collaborating closely with clients and their advisors to develop custom solutions that achieve their unique financial goals.
Thank you for being a Break Sponsor.

EVENT MAP


4' 0"
360 chairs
Seating 2 per 6'
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SCREEN
SCREEN
Double-sided buffet
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Speaker Ready Room / Green Room
REGISTRATION
Office
Soft Seating

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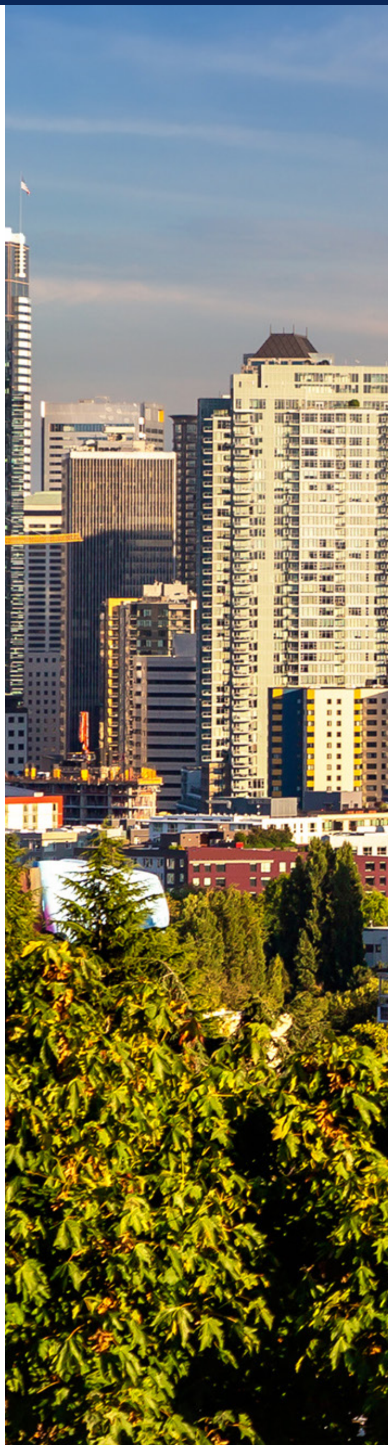

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