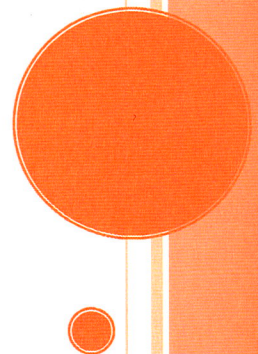


# SALT LAKE ESTATE PLANNING COUNCIL AGENDA

*2017 FALL INSTITUTE*

November 2, 2017



# SALT LAKE ESTATE PLANNING COUNCIL AGENDA

## *2017 FALL INSTITUTE*

8:00 am to 8:30 am	Registration and continental breakfast	Ballroom C
8:30 am	Welcome/Introduction	Ballroom C
8:30 am to 10:00 am	Keynote Speaker- Sam Donaldson 2017 Federal Tax Update	Ballroom C
10:00 am to 10:15 am	Break	
10:15 am to 11:45 am	Keynote Speaker-Sam Donaldson Contemporary Estate Planning	Ballroom C
11:45 am to 12:00 pm	Break	
12:00 pm to 1:00 pm	Lunch Speaker- Alema Harrington Utah Jazz Organization	Ballroom C

## AFTERNOON SESSIONS 1<sup>ST</sup> BREAKOUT

1:10 pm - 2:10 pm

- |    |  |            |
|----|--|------------|
| #1 | PRACTICAL AND CREATIVE USES OF<br>INSURANCE AND FINANCIAL PRODUCTS<br>IN PLANNING<br>Presenter: Boyce Lowery | Ballroom C |
| #2 | AVOIDING FIDUCIARY PITFALLS<br>Presenter: Steve Tingey   | Tucson     |
| #3 | ADVISING CLIENTS ON BUY/SELL<br>AGREEMENT OPTIONS<br>Presenter: Mark Astling                                 | Sun Valley |

2:10 pm - 2:20 pm BREAK

## AFTERNOON SESSIONS 2<sup>ND</sup> BREAKOUT

2:20 pm - 3:20 pm

- |    |   |            |
|----|---|------------|
| #1 | PLANNING FOR DIGITAL PROPERTY<br>Presenter: Will Harnish  | Ballroom C |
| #2 | WHAT TO DO ON THE SECOND DEATH WHEN<br>NOTHING WAS DONE OF THE FIRST DEATH<br>Presenter: Rylee McDermott  | Tucson     |
| #3 | BALANCING THE NEEDS OF INCOME AND<br>REMAINDER BENEFICIARIES THROUGH<br>ASSET ALLOCATION AND INVESTMENT<br>MANAGEMENT<br>Presenters: Doug Wells, Matt Krull,<br>Thomas Mecham | Sun Valley |

3:20 pm - 3:30 pm BREAK

## AFTERNOON SESSIONS 3<sup>RD</sup> BREAKOUT

3:30 pm - 4:30 pm

- |    |  |            |
|----|--|------------|
| #1 | FIXING BROKEN ESTATE PLANS<br>Presenter: Jonathan Hoagland   | Ballroom C |
| #2 | WHAT TO DO ON THE SECOND DEATH WHEN<br>NOTHING WAS DONE OF THE FIRST DEATH<br>Presenter: Rylee McDermott | Tucson     |
| #3 | ADAPT, CHANGE OR DISAPPEAR<br>Presenters: John Bird & David York   | Sun Valley |

4:30 pm ADJOURN

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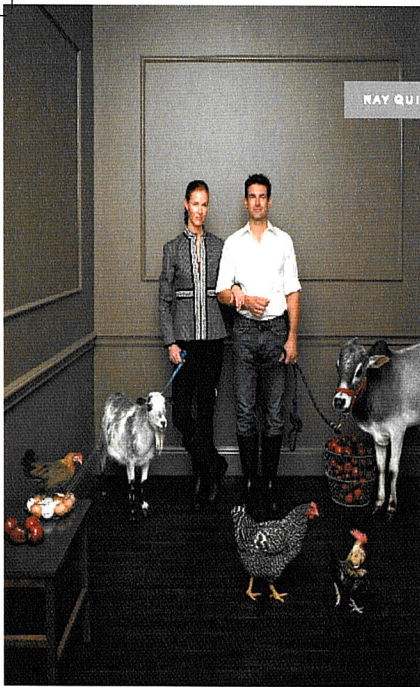
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