SPOKANE
ESTATE PLANNING
COUNCIL

Agenda for Spokane Estate Planning Council 2017 Annual Seminar

May 23, 2017
Gonzaga University School of Law – Moot Court Room

7:30 AM	Registration	
8:00 AM	Welcome - Introduction	**Charles J. Murphy,** *Vice President for Finance, Gonzaga University*
8:15 AM	Opening Remarks	**Stephanie Taylor**, *SEPC President* J.D., LL.M. *Randall|Danskin, P.S.*
8:30 - 9:30 AM	Secondary Planning for CRT's	**David Murray,** *Managing Director of Sterling Foundation Management LLC*
9:30-10:40 AM	What to Exepect from President Trump's Tax Reform	**Kelli Franco,** *CPA, Partner* **& Val Perry,** *CPA, Partner* *Moss Adams LLP*
10:40 – 11:00 AM	BREAK	
11:00 – 11:30 AM	Economic Update	**Michael Brejda.** *Managing Director,* *US Trust Portfolio Management*
11:45 – 1:15 PM	SEPC Annual Meeting & Lunch McCarthy Athletic Center	Keynote Speaker: **Phillip Tyler**, Former *President* *Spokane Chapter NAACP and* *President/Consultant of Wisdom in Words*
1:15 – 2:15 PM	Understanding your Social Security Options	**J. Patrick Clunan**, *Manager, the Learning Center* *Columbia Threadneedle Investments*
2:15 – 3:15 PM	Planning for Regulated Assets	**Wendy S. Goffe**, *JD, Partner* *Stoel Rives LLP*
3:15 – 3:30 PM	BREAK	
3:30 – 4:30 PM	The Bridge Trust – Offshore Protection with Domestic Simplicity	**Douglass Lodmell**, *JD, LLM* *Lodmell & Lodmell*