FACULTY FOR THE SPOKANE ESTATE PLANNING COUNCIL'S 2019 ANNUAL SEMINAR

Planning for Our Clients' Future

JACOB H. ROOKSBY, J.D., Ph.D.

Dean of Gonzaga University School of Law
Gonzaga University

Jacob H. Rooksby was appointed Dean of Gonzaga University School of Law in June 2018. He also holds a joint appointment as a tenured Professor of Law and Professor of Education. Prior to joining Gonzaga, Dean Rooksby was Associate Professor and Associate Dean at Duquesne University School of Law, where he taught Torts I and Torts II, among other courses. While on the faculty at Duquesne, Dean Rooksby was Of Counsel to the intellectual property (IP) practice group at Cohen & Grigsby, P.C. in Pittsburgh and served as an expert witness in IP litigation.

Dean Rooksby's scholarship lies in two fields: IP law and higher education law. He published a book with Johns Hopkins University Press in 2016, *The Branding of the American Mind: How Universities Capture, Manage, and Monetize Intellectual Property and Why It Matters*. He also is co-author of the 6th edition of *The Law of Higher Education*, the leading treatise in the field.

Upon earning his J.D. from the University of Virginia, Dean Rooksby joined McGuireWoods LLP in Richmond, Virginia, practicing in the firm's IP litigation group and as a member of its higher education practice team. In addition to his law degree, he also holds M.Ed. (Social Foundations of Education) and Ph.D. (Higher Education) degrees from the University of Virginia. Dean Rooksby earned his undergraduate degree, summa cum laude, in Hispanic Studies and Government from the College of William & Mary, where he was inducted into Phi Beta Kappa.

KIM WELLER, CPA/AVB

Manager – Business Valuations
Anastasi, Moore & Martin, PLLC

Kim graduated from Washington State University in 1990 with an emphasis in finance. Kim has numerous years in private and public accounting. She started focusing full-time on business valuation in 2007. Kim is a Certified Public Accountant (CPA) licensed in the state of Washington and is accredited in business valuation (ABV) by the AICPA. She has valued businesses for a variety of purposes, including estate and gift tax planning and reporting, financial reporting, other tax reporting, transaction planning, and litigation purposes. The businesses she has valued include those in the following industries: construction, manufacturing, restaurant/bars, farming, wineries, dealerships, healthcare, telecommunications, and aerospace.

In addition to being a member of the AICPA and WSCPA, Kim currently serves as the President for the Spokane Estate Planning Council.

KATHERINE ROY, CFP ®

Managing Director, Chief Retirement Strategist and Head of Individual Retirement for J.P. Morgan Funds
J.P. Morgan Asset Management

Katherine is the Chief Retirement Strategist and Head of Individual Retirement for J.P. Morgan Funds. In this role, Katherine is responsible for delivering timely personal retirement-related insights to financial advisors. Focused on the retirement income-related landscape for more than 10 years, Katherine specializes in identifying themes, strategies and solutions that can help advisors successfully partner with individuals in the transition and distribution life stages.

Katherine is consistently ranked as a top speaker at major industry and firm-specific conferences and events. She also has been interviewed and quoted in the financial press on a variety of key retirement planning topics.

Prior to joining J.P. Morgan Asset Management, Katherine was Head of Personal Retirement Planning & Advice at Merrill Lynch where she led strategy and innovation in retirement income solutions for individuals, and the retirement planning, advice and guidance programs available to integrated benefits plan participants. She also held several roles in financial planning product development, participant communications and consulting, and interactive client experience initiatives. Katherine received a B.A. from Yale University and is a Certified Financial Planner®.

ASHLEY ROSE STUMBAUGH, CIMA ®

Vice President, Client Advisor, Institutional Advisor
J.P. Morgan Asset Management

Ashley Rose is a Client Advisor on the Institutional Advisor Division of J.P. Morgan Asset Management, covering the Pacific Northwest, based in Seattle. She has been an employee of J.P. Morgan Asset Management since 2012. Ashley Rose represents the J.P. Morgan Asset Management's exchange traded fund, mutual fund, managed account, alternative investment and wealth management capabilities within the independent investment advisor community. Prior to joining the Institutional Advisor team, Ashley Rose completed a two-year analyst rotation program in Finance. She obtained a B.S. in Business Administration from American University and holds the Series 7 and 63 licenses as well as the Certified Investment Management Analyst designation.

JORDON ROSEN, CPA, MST, AEP ®

Director and Shareholder
Belfint, Lyons & Shuman.

Jordon N. Rosen, CPA, MST, AEP ® is a Director and shareholder in the Wilmington, Delaware CPA firm of Belfint, Lyons & Shuman, where he heads the firm's estate and trust practice. Jordon also provides tax consulting and compliance services to the firm's higher net worth clients and business owners. He is the Past President of the National Association of Estate Planners and Councils (NAEPC) and has served as president of the Delaware Estate Planning Council and the Chester County, PA Estate Planning Council. Mr. Rosen is also a member and past chair of the Delaware State Chamber of Commerce tax committee, is a past member of the AICPA Trust, Estate and Gift Tax Technical Resource Panel, and is a member of the editorial board of Thomson Reuters Focus publication.

Jordon is a licensed CPA in Delaware and Pennsylvania and is a member of the Pennsylvania Institute of CPAs, Delaware Society of CPAs and the AICPA Tax Section. He also holds the designation of Accredited Estate Planner ® and has been recognized as a 5-Star Wealth Manager by Philadelphia Magazine and Delaware Today. Mr. Rosen is a frequently sought out speaker both locally and nationally on tax planning and related issues and has published more than 100 articles. He has been a frequent television and radio guest and a past host of Money Talk on 1450-WILM. He received his undergraduate degree in Accounting from Temple University and his Master's degree in Taxation from Widener University.

DR. DEANNA DAVIS – KEYNOTE SPEAKER
The Power of One

Author, Professional Speaker and Entertainer
Tour de force Speakers

Deanna Davis is the author of three best-selling books, is an accomplished professional speaker and entertainer with Tour de force Speakers, and has 25 years' experience as an executive, leadership coach, and strategic consultant. Known for her characteristic blend of humor and how-to, Dr. Davis shares cutting-edge research and practical strategies for creating extraordinary success and satisfaction in work and in life. She helps audiences focus on what matters most and what works best so they can love their life and live their purpose with more ease and less stress.

Dr. Davis has spoken and consulted on topics such as Bridging the Confidence Gap; Radical Resilience; and Leading the Charge | Leading for Change for companies as diverse as Microsoft, Baird Financial, The National Association of Women Business Owners, The American Heart Association, Farmers Insurance, and many others. She holds a PhD in Leadership with a focus on Positive Psychology from Gonzaga University and a Master of Public Health Degree with a focus on health promotion from the University of Washington.

Deanna advocates personal, professional, and organizational change using "the big power of small," since small changes, small steps, and small investments lead to big—and lasting—results over time. She is an admitted laughaholic and a strong proponent of officially naming chocolate as a major food group.

CURT CRUSCH

APS Program Consultant / Home & Community Services
Aging & Long-Term Support Administration
Washington State Department of Social and Health Services

Mr. Crusch holds a degree in psychology and has worked as an APS investigator since November 2008. He is an Adult Protective Services Program Consultant working in the Home and Community Services Aging and Long-Term Support Administration under the Washington State Department of Social and Health Services. Curt has many experiences to educate the Spokane community on witnessing, advising, protecting and detecting Elder Abuse, including the steps necessary for prosecution.

ADAM SWEET, J.D., LL.M.

Principal
Eide Bailly LLP, National Tax Office

Adam Sweet is a principal with Eide Bailly's National Tax Office, located in Spokane, Washington. He has become a frequent speaker on many topics relating to tax reform, including considerations for both individuals and businesses. Adam's general focus is on passthrough entities, like LLCs, partnerships, and S corporations. He previously worked in the national tax office of a large accounting firm in Washington DC, and before that he was an IRS litigator.

Adam works hard to distill complicated tax issues and strategies into a language that can be understood by non-tax professionals. He completed his education with a Bachelor of Arts, History – University of Washington, Seattle; a Juris Doctor from Lewis and Clark Law School, in Portland, Oregon and a Master in Tax (LL.M.) from Georgetown University Law Center, Washington, D.C. Adam is also Member of the California Bar.

Adam's Client Work Highlights include:

- Represented the IRS in the U.S. Tax Court
- Provided guidance on the interpretation of partnership agreements
- Submitted private letter rulings requests to the IRS
- Written opinions and memorandum
- Researched complex tax issues
- Published Tax Court cases

MONIQUE CORIGLIANO CPA, CFP ®, IAR

Shareholder, Registered Representative and
Investment Adviser Representative
Richards, Merrill & Peterson

Monique joined RMP in 2000. She is a native of Spokane and a graduate from Eastern Washington University. Monique is a CPA, CERTIFIED FINANCIAL PLANNER™ Professional, a Registered Investment Advisor and Shareholder with Richards, Merrill & Peterson. She has been with the firm for 19 years however Monique has over 30 years of experience in the financial services area. She serves a variety of clientele including individuals, businesses, trusts, estates and retirement plans, providing customized, well-diversified portfolios. She is currently serving as the Vice President for the Spokane Estate Planning Council after serving on committees and the board for seven years. She also serves on the Spokane Symphony Planned Giving Committee and is a member of the American Institute of CPAs. Monique in her free time enjoys spending time with family and friends, exercise and travel.