

Greene County Estate Planning Council

February 2019

WELCOME NEW MEMBERS!

2018-2019 Membership Information

It's time to renew your membership for the 2018-2019 year! Please get your renewals in as soon as possible. Dues were due by October 1st.

5:30 PM Gathering (First Call)

6:00 PM Dinner

6:30 PM Program

7:15ish Business

PLEASE WEAR A NAMETAG AT THE MEETING

February 20, 2019

Speakers: Christine Graham & Susan Himmelstein

Presentation: **Who's the Boss?**

Bifurcation of Trustees' Duties, Directed Trustees and Delegation

Christine Graham is currently serving as Senior Legal Counsel with the Private Wealth Legal Department for UMB Bank n.a. She previously served as both Senior Trust Counsel and as a Fiduciary Advisor to BMO Harris Bank N.A., Wealth Management U.S., and Marshall & Ilsley Trust Company N.A. Prior to becoming an in-house advisor, Christine practiced with Shughart Thomson & Kilroy, and then the Polsinelli law firm, in the areas of fiduciary litigation, trust and estate litigation, probate, estate and business planning, taxation and general corporate law. She earned her Bachelor's degree in Journalism from the University of Kansas, her Juris Doctorate (JD) from Washburn University School of Law, and her Masters of Law (LLM) in Taxation from the University of Missouri-Kansas City School of Law. She is the immediate past Chair of the Kansas City Estate Planning Symposium and is an active member of the Kansas City Estate Planning Society, Children's Mercy Planned Giving Council and the Johnson County Bar Association. Mrs. Graham can be reached at (816) 860-7738 or at christine.graham@umb.com.

Susan Himmelstein joined UMB Bank in 2004 as a Trust Advisor working with high net worth families. In 2012, Susan joined Private Wealth Legal where she serves as Vice President and Legal Counsel. Prior to joining UMB, Susan was employed by Husch and Eppenberger, LLC as an estate planning attorney. Prior to her tenure at Husch and Eppenberger, Susan worked as an attorney with Bryan Cave LLP in the estate planning and bankruptcy departments. She received her Juris Doctorate from Georgetown University Law Center, and her Bachelor of Arts from Washington University in St. Louis, with a double major in French and English. She has been admitted to the Missouri and Illinois Bars, is a member of the Kansas City Estate Planning Society, the Kansas City Metropolitan Bar Association, and is on the board of Blue Valley Industries, which is a sheltered workshop in the Kansas City metro area. Susan can be reached at (816) 860-7716 or at susan.himmelstein@umb.com.

RESERVATIONS & CANCELLATIONS

RESERVATIONS ARE REQUIRED

Please RSVP
no later than 5:00 PM
February 17, 2018

2018-2019 MEETING DATES

ALL MEETINGS WILL BE HELD AT TWIN OAKS COUNTRY CLUB

~~SEPTEMBER 19, 2018~~

~~OCTOBER 17, 2018~~

~~NOVEMBER 28, 2018~~

~~DECEMBER 19, 2018 (Guest Night)~~

~~JANUARY 16, 2019~~

FEBRUARY 20, 2019

MARCH 20, 2019

APRIL 24, 2019 (Guest Night)

You are welcome, and encouraged, to bring guests to any meeting. With the exception of guest night, you will be billed for your guest's meal. When you invite a guest, encourage them to go to our website and fill out an application form for membership in the council. If the guest is accepted into membership, the cost of the guest meal will be waived.

2018-2019 Officers/Directors

President	Stephen Evans Evans Wealth Planning 860-5678 Stephen@EvansWealthPlanning.com
Pres-Elect	Stephen Gintz Hagan, Tucker, Schmitt & Gintz, LLC 881-6919 Sgintz@htsgcpa.com
Secretary	Diane Homan Central Trust Company 569-1605 Diane.homan@centraltrust.net
Treasurer	Stephen Aton Aton Law Firm 881-5667 steve@atonlaw.com

Other Directors

Terms Expire 2019

Andy Peebles

Skylar Smith

Jennifer Moore

Carrie Brown

Terms Expire 2020

David Healy

Josh Hartman

Bud Page

Lindsey Dale