

# Greene County Estate Planning Council

January 2019

## WELCOME NEW MEMBERS!

**MATTHEW SCHMIDT  
&  
DAVID OLIVE**

### 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 1<sup>st</sup>.

**5:30 PM Gathering (First Call)**

**6:00 PM Dinner**

**6:30 PM Program**

**7:15ish Business**

## January 16, 2019

Speakers: Lori Rook and Danielle R. Kincaid

Presentation: **Crisis Medicaid Planning**

### Lori Rook

Lori Rook was born and raised in the Springfield area. She obtained her undergraduate degree from Missouri State University in 2003 where she graduated with honors. In 2006 Lori received her law degree from Oklahoma City University School of Law. Since 2012 Lori has focused her practice in the areas of Elder Law, Probate, Estate Planning and Litigation. Prior to joining Ozarks Elder Law, Lori's practice was focused in the areas of civil litigation, specifically premises liability, insurance defense, contract disputes, product liability, premises liability, medical malpractice and real estate. During that time, she practiced with a local defense firm and large defense firm, gaining invaluable litigation and trial experience. In addition to her work as an Elder Law attorney, Lori serves on the Judicare Panel and Volunteer Lawyer Panel with Legal Services of Southern Missouri. She currently serves on the Board for the Nixa Chamber. She is also very involved in the Junior League of Springfield, where she has previously served as a board member, and the March of Dimes. In 2015 Lori was named a Rising Star for Missouri and Kansas Super Lawyers. In addition, was named a Trusted Advisor by Springfield Business Journal in 2016.

### Danielle R. Kincaid

Danielle graduated cum laude from Creighton University School of Law in 2011, where she served as President of the Student Bar Association, a member of the editorial staff of the Creighton Law Review, and was a founding editor of the Creighton International and Comparative Law Journal. Danielle focuses her practice on Estate Planning, Probate, Trust Administration and Litigation, and Elder Law. Prior to joining Ozarks Elder Law in 2015, Danielle gained valuable experience in estate planning, litigation, real estate transactions, and business formation during her time as an attorney at a local Springfield firm and as in-house counsel at a national title insurance company. In addition to her work at Ozarks Elder Law, Danielle enjoys giving back to the community through her service as a board member of the Foundation for Springfield Public Schools, a member of Leadership Springfield Class 35, and as immediate past President of the Young Advocates Council for the Child Advocacy Center, Inc.

## JANUARY MENU OPTIONS

- 1** Beef – Steak Diane with garlic mashed potatoes
  - 2** Chicken – Chicken Marsala with garlic mashed potatoes
  - 3** Fish – Mahi Mahi with Rice
- Dessert – Chocolate Raspberry Napoleon

**PLEASE WEAR A NAMETAG AT THE MEETING**

## RESERVATIONS & CANCELLATIONS

### RESERVATIONS ARE REQUIRED

**Please RSVP**  
**no later than**  
**5:00 PM**  
**January 13, 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

<b>President</b>	Stephen Evans Evans Wealth Planning 860-5678 <a href="mailto:Stephen@EvansWealthPlanning.com">Stephen@EvansWealthPlanning.com</a>
<b>Pres-Elect</b>	Stephen Gintz Hagan, Tucker, Schmitt & Gintz, LLC 881-6919 <a href="mailto:Sgintz@htsqcpa.com">Sgintz@htsqcpa.com</a>
<b>Secretary</b>	Diane Homan Central Trust Company 569-1605 <a href="mailto:Diane.homan@centraltrust.net">Diane.homan@centraltrust.net</a>
<b>Treasurer</b>	Stephen Aton Aton Law Firm 881-5667 <a href="mailto:steve@atonlaw.com">steve@atonlaw.com</a>

## Other Directors

### Terms Expire 2019

Andy Peebles

Skylar Smith

Jennifer Moore

Carrie Brown

### Terms Expire 2020

David Healy

Josh Hartman

Bud Page

Lindsey Dale