

Greene County Estate Planning Council

March 2018

Welcome New Member

Don Angell

2017-2018 Membership Information

If you have not yet renewed your membership for the 2017-2018 year, please get your renewals in as soon as possible. Dues were due October 1st.

Agenda:

5:30 PM	Gathering (first call)
6:00 PM	Dinner
6:30 PM	Program
7:15 ish	Business

March 21, 2018 Meeting

“Major Asset, Major Pain: Estate Planning for IRA’s”

Speaker: Susan Teson

Susan B. Teson is Deputy Chief Fiduciary Officer, Senior Legal Counsel and Senior Vice President with UMB Bank, n.a., Kansas City, Missouri. Ms. Teson has been a member of the Missouri Bar since 1982. With UMB since 1992, she manages UMB’s Private Wealth Management Legal, Fiduciary Tax, Real Estate and Unique Assets Departments. Ms. Teson received her Bachelor of Arts degree in English, with distinction, from the University of Missouri-Kansas City in 1976 and her Juris Doctor degree, with distinction, from the University of Missouri-Kansas City School of Law in 1982. She was a member of the Bench & Robe Society, the UMKC Law Review and Editor-in-Chief of the UMKC Law Review in 1981-82. She has been a Certified Financial Planner since 1995. Additional professional affiliations include the Kansas City Metropolitan Bar Association, the Estate Planning Society of Kansas City and the Kansas City Estate Planning Symposium Board. She is also a member of the Missouri Bar’s Probate and Trust Law Committee, including its subcommittee which studied the Uniform Trust Code for adoption in Missouri and has been active in commenting about the UTC in Nebraska, Oklahoma, Colorado and Kansas. She most recently chaired the Power of Appointment subcommittee which drafted the Missouri Uniform Power of Appointment Act, adopted by the Missouri legislature in 2016. She co-authored two articles about the Missouri Powers of Appointment Act published in the Missouri Bar Journal in 2017. Ms. Teson has served as an adjunct professor at the UMKC Law School teaching estate planning and drafting since January, 2017.

MARCH MENU OPTIONS

- 1 Beef – Beef Tuscan with crimini mushrooms and roasted garlic mashed potato
- 2 Chicken – Chicken Oscar served with lemon chive risotto
- 3 Fish – Grilled market fish with lemon chive risotto and grilled asparagus

Dessert – New York Cheesecake

PLEASE WEAR A NAMETAG AT THE MEETING

RESERVATIONS & CANCELLATIONS

RESERVATIONS ARE REQUIRED

Please RSVP
no later than
5:00 PM
March 16, 2018

2017-2018 MEETING DATES

ALL MEETINGS WILL BE HELD AT TWIN OAKS COUNTRY CLUB

SEPTEMBER 20, 2017

OCTOBER 18, 2017

NOVEMBER 15, 2017

DECEMBER 20, 2017 (Guest Night)

JANUARY 17, 2018

FEBRUARY 21, 2018

MARCH 21, 2018

APRIL 25, 2018 (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.

2017-2018 Officers/Directors

President Courtney Fletcher
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cfletcher@cecb.com

Pres-Elect Stephen Evans
Evans Wealth Planning
860-5678
Stephen@EvansWealthPlanning.com

Secretary Stephen Gintz
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881-6919
Sgintz@htsqcpa.com

Treasurer Diane Homan
Central Trust Company
569-1605
Diane.homan@centraltrust.net

Other Directors

Terms Expire 2018

Anne Salle Mason

David Compere

Drew Spencer Mike

Pruett

Terms Expire 2019

Andy Peebles

Skylar Smith

Jennifer Moore

Carrie Brown