

# Greene County Estate Planning Council

March 2020

## Welcome Back!

<b>5:30 PM</b>	<b>Gathering (First Call)</b>
<b>6:00 PM</b>	<b>Dinner</b>
<b>6:30 PM</b>	<b>Program</b>
<b>7:15ish</b>	<b>Business</b>

## MARCH MENU OPTIONS

- 1** Beef Tuscan with cremini mushrooms and roasted garlic mashed potato
  - 2** 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**

## March 18, 2020

### “I’m Your Huckleberry: Ethical Issues for Attorneys Who Act as Trustee”

**Jay E. Harker, JD**  
Senior Vice President  
Stifel Trust Company, N.A.

Jay has been in the trust industry since 1982. He is a long-time member of the Estate Planning Council of St. Louis, is past Chair of the Probate and Trust Law Steering Committee of the Bar Association of Metropolitan St. Louis, and is past Chair of the Missouri Bar’s Corporate Fiduciary Subcommittee. He has authored numerous articles and presented educational seminars for attorneys, CPAs, clients, and financial professionals nationwide.

Jay graduated from the Saint Louis University School of Law, where he was Assistant Managing Editor of the Saint Louis University Law Journal. He is admitted in Missouri and Illinois. He holds a Ph.D. (summa cum laude) in Philosophy from the University of Illinois and a B.A. (magna cum laude) in English and Philosophy from Ball State University.

## RESERVATIONS & CANCELLATIONS

### RESERVATIONS ARE REQUIRED

**Please RSVP**  
**no later than**  
**5:00 PM**  
**March 16, 2020**

## 2019-2020 MEETING DATES

ALL MEETINGS WILL BE HELD AT TWIN OAKS COUNTRY CLUB

~~SEPTEMBER 18, 2019~~

~~OCTOBER 16, 2019~~

~~NOVEMBER 20, 2019~~

~~DECEMBER 18, 2019 (Guest Night)~~

~~JANUARY 15, 2020~~

~~FEBRUARY 19, 2020~~

MARCH 18, 2020

APRIL 22, 2020 (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.

## 2019-2020 Officers/Directors

**President** Stephen Gintz  
Hagan, Tucker, Schmitt & Gintz, LLC  
881-6919  
[Sgintz@htsqcpa.com](mailto:Sgintz@htsqcpa.com)

**Pres-Elect** Diane Homan  
Central Trust Company  
569-1605  
[Diane.homan@centraltrust.net](mailto:Diane.homan@centraltrust.net)

**Secretary** Stephen Aton  
Aton Law Firm  
881-5667  
[steve@atonlaw.com](mailto:steve@atonlaw.com)

**Treasurer** David Compere  
UMB Bank - Financial Services  
891-2101  
[David.compere@umb.com](mailto:David.compere@umb.com)

## Other Directors

### Terms Expire 2020

David Healy

Josh Hartman

Bud Page

Lindsey Dale

### Terms Expire 2021

Tylor Willis

Meredith Bosso

Martha Atkinson

Matthew Schmidt