

Greene County Estate Planning Council

November 2017

Welcome New Members

Brian Hamburg, JD – Hamburg & Lyons

James Philpot, Associate - MSU

and

Tylor Willis, CFP – Northwestern Mutual

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

November 15, 2017 Meeting Notice

“Estate Liquidity Planning Using Entity Redemption; Dealing with Estate Planning Uncertainty Using a Flexible ILIT; and Life Insurance Planning in an Era of Estate Tax Uncertainty”

Speaker: Keith Buck, JD, LL.M., CLU®, FLMI

Keith Buck is an assistant vice president of Pacific Life’s Advanced Designs Unit, a highly recognized team of advanced market experts for the life insurance industry.

Keith joined Pacific Life in 2008 as a director of the Advanced Designs Unit. He is the driving force behind Pacific Life’s Professional Advisor Program, which helps connect life insurance producers with experts in other fields.

Keith graduated Order of the Coif in the top 10 percent of his class from Drake Law School. He also holds a master of laws in taxation degree from Boston University Law School and is a Chartered Life Underwriter and Fellow of the Life Management Institute.

Outside of work, Keith enjoys playing tennis and spending time in Laguna Niguel, California, with his wife, Sharon, and their five children.

NOVEMBER MENU OPTIONS

- 1 Pork – Roast Pork loin with cranberry peppercorn sauce
 - 2 Chicken – Roast Chicken with sage gravy
 - 3 Fish – Grilled Salmon with lobster mashed potato, topped with Mediterranean relish
- Dessert – Caramel pecan cheese cake

PLEASE WEAR A NAMETAG AT THE MEETING

RESERVATIONS & CANCELLATIONS

RESERVATIONS ARE REQUIRED

Please RSVP
no later than
5:00 PM
November 10, 2017

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
Carnahan, Evans, Cantwell & Brown PC
447-4400
cfletcher@cecb.com

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

Secretary Stephen Gintz
Hagan, Tucker, Schmitt & Gintz, LLC
881-7912
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