

SIouxLAND

ESTATE PLANNING COUNCIL

Welcome to the Siouxland Estate Planning Council.

We hope you enjoy the programs scheduled for 2017-2018 and find our professional networking rewarding.

BOARD MEMBERS

2017-2018 SEASON

Executive Board:

President	Christie Finnegan
Vice President	Lynda Cruickshank
Treasurer	Tim Swedean
Membership	Chrystal Davis
Secretary	Anthony Lamb

Representatives:

Attorneys	Kent Vriezelaar
CPAs	Annette Goetsch
Trust Officers	Mike McAlpine
Insurance/Investments	Gregory Giles
Allied Professionals	Dan Kriener
Past President	Kim Kletschke

MEMBERSHIP

A membership application can be found on our website: www.siouxlandepc.org

Annual membership dues are \$150.

For any current member who brings in a new member a \$50 credit will apply toward the current member's council dues for the following year!

Invite your colleagues and valued professionals to join you in this important network of estate planning professionals in Siouxland.

CONTACT

Siouxland Estate Planning Council
Chrystal Davis, Membership Chair
325 Dakota Dunes Blvd.
Dakota Dunes, SD 57049
Phone: 605-232-6073
Email: cdavis@snbonline.com
www.siouxlandepc.org

National Association of Estate Planners & Councils
1120 Chester Ave. Suite 470
Cleveland, OH 44114
Phone: 866-226-2224
Fax: 216-696-2582
Email: admin@naepc.org
www.naepc.org

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The Council's mission is to share ideas, learn about new or existing issues and provide the best estate, tax, and financial planning services for our clients.

The Siouxsland Estate Planning Council is a non-profit organization for professionals. Members meet the first Tuesday of each month from September through May (excluding the months of December and April).

The Council's members include attorneys, accountants, financial planners, investment advisors, life insurance agents, trust officers, farm managers, planned giving and non-profit professionals, as well as other professionals from Siouxsland and the surrounding communities.

Visit our website for expanded program information and speaker bios:

www.siouxslandepc.org

2017-2018 SCHEDULE

Location: Marina Inn Hotel
South Sioux City, NE

Agenda

11:45 a.m.	Networking
12:00 p.m.	Lunch
12:10 p.m.	Business/Announcements
12:15 p.m.	Presentation
1:15 p.m.	Conclusion

TUESDAY, SEPTEMBER 5, 2017

Program: "7 Actionable Social Media Tips for Your Business"

Presenter: Beth Trejo, President and Founder of Chatterkick

TUESDAY, OCTOBER 03, 2017

Program: "ESOPs: Trends and Opportunities"

Presenter: Dan Zugell, CLU, ChFC, LUTCF - Senior Vice President, Business Transition Advisors (BTA)

TUESDAY, NOVEMBER 7, 2017

Program: "About Foreign Account Tax Compliance Act (FATCA) and Reporting"

Presenter: Beatrice Skyberg, CPA, AEP and Mike Criddle, CPA from Eide Bailly

TUESDAY, JANUARY 9, 2018

Program: "New Iowa Uniform Fiduciary Access to Digital Assets Act"

Presenter: Joshua P. Weidemann, J.D. O'Connor & Thomas, P.C.

TUESDAY, FEBRUARY 6, 2018

Program: "Gifting and Advanced Beneficiaries, Structuring the Qualified Accounts to Fund Look Through Trusts. Updating the Use of Life Insurance Trusts"

Presenter: Robert D. Hodges, Attorney, Brown Winick P.L.C.

TUESDAY, MARCH 6, 2018

Program: "Times are Changing: A Review of Tax Reform Proposals and Recent Tax Law Updates"

Presenter: Kristine Tidgren, Assistant Director at Iowa State University's Center for Agricultural Law and Taxation (CALT)

ANNUAL MEETING

TUESDAY, MAY 1, 2018

Program: "Business Succession, Family Dynamics and Family Governance"

Presenter: Susan P. Rounds, JD, CPA LL.M. (taxation), AEP® Director, Deutsche Bank Trust Company