

# SIouxLAND

## ESTATE PLANNING COUNCIL

Welcome to the Siouxland Estate Planning Council.

We hope you enjoy the programs scheduled for 2018-2019, and find our professional networking opportunity rewarding.

## BOARD MEMBERS

### Executive Board:

President	Lynda Cruickshank
Vice President	Chrystal Davis
Treasurer	Jeff Welsh
Membership	Anthony Lamb
Secretary	Karrie Hruska

### Representatives:

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

## MEMBERSHIP

A membership application can be found on our website: [www.siouxlandepc.org](http://www.siouxlandepc.org)

Annual membership dues are \$150.

Invite colleagues and professionals to join you in this valuable network of estate planning professionals in Siouxland.

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

## CONTACT

### Siouxland Estate Planning Council

Tony Lamb, Membership Chair  
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Email: [lamb@klasslaw.com](mailto:lamb@klasslaw.com)  
[www.siouxlandepc.org](http://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](mailto:admin@naepc.org)  
[www.naepc.org](http://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 Siouland 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 Siouland and the surrounding communities.

**Visit our website for expanded program information and speaker bios:**

[www.sioulandepc.org](http://www.sioulandepc.org)

## 2018-2019 SCHEDULE

**Location:** Delta Hotel by Marriot  
South Sioux City Riverfront  
385 E 4<sup>th</sup> Street  
South Sioux City, NE 68776

### Agenda

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

### TUESDAY, SEPTEMBER 4, 2018

**Program:** Fair vs. Equal: Planning Techniques to Avoid Family Estate Litigation  
**Presenter:** Erin Herbold, Swalwell, J.D.-  
Brick Gentry P.C.

### TUESDAY, OCTOBER 2, 2018

**Program:** Effects of Legalized Marijuana on Estate Planning  
**Presenter:** Dr. Gerry W. Beyer, Governor  
Preston E. Smith Regents Professor of Law

### TUESDAY, NOVEMBER 6, 2018

**Program:** How to Avoid and What To Do if Audited by the IRS  
**Presenter:** Michael Gregory, NSA,  
MBA, ASA, CVA; Founder Michael  
Gregory Consulting LLC

### TUESDAY, JANUARY 8, 2019

**Program:** Late-Stage College Planning Strategies You Don't Know About But Should

**Presenter:** Susan Westerholm, College Inside Track

### TUESDAY, FEBRUARY 5, 2019

**Program:** Investment Banking, Funding Sources and the "Cap Stack"

**Presenter:** Mike Anderson, Managing Principal at Bridgepoint Merchant Bank

### TUESDAY, MARCH 5, 2019

**Program:** A Review of Tax Law and Recent Changes

**Presenter:** Kristine Tidgren- Director of CALT, Adjunct Assistant Professor, Agricultural Education & Studies

### TUESDAY APRIL 23, 2019

Tentative- New Member & Recruiting Social

### ANNUAL MEETING TUESDAY, MAY 7, 2019

**Program:** Succeeding In Business Markets: Business Continuation (Buy-Sell, Etc.)

**Presenter:** Michael W. Halloran, CFP®, AEP®, Distinguished, ChFC®, CLU®, RICP®; Northwestern Mutual

