

# SIouxLAND

## ESTATE PLANNING COUNCIL

Welcome to the Siouxland Estate Planning Council.

We hope you enjoy the programs scheduled for 2019-2020, and find our professional networking opportunity rewarding.

## BOARD MEMBERS

### Executive Board:

President	Chrystal Mollet
Vice President	Anthony Lamb
Treasurer	Jeff Welsh
Membership	Karrie Hruska
Secretary	Jordan Hermanson

### Representatives:

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

## MEMBERSHIP

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

Annual membership dues are \$200.

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

Karrie Hruska, Membership Chair  
501 Pierce Street, Suite 300  
Sioux City, IA 51102  
Phone: 712-252-0020  
Email:  
[KHruska@Mooreheffernanlaw.com](mailto:KHruska@Mooreheffernanlaw.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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ESTATE PLANNING COUNCIL

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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 Siouxland 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, and life insurance agents, trust officers, farm managers, planned giving and non-profit professionals, as well as other professionals from Siouxland and the surrounding communities.

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

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

## 2019-2020 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 3, 2019

**Program:** Fiduciary Insurance for Plan Sponsors-passive or active?

**Presenter:** R.L. "Dick" Billings, CPC, CEBS, RF, ERPA

### TUESDAY, OCTOBER 1, 2019

**Program:** Avoiding the Unintentionally Defective Trust

**Presenter:** Jay Harker, SVP & Director of Marketing & New Business Development, Stifel

### TUESDAY, NOVEMBER 5, 2019

**Program:** Iowa Judge's Panel

**Presenter:** TBD

### TUESDAY, JANUARY 7, 2020

**Program:** TBD

**Presenter:** Kyle Irvin, JD

### TUESDAY, FEBRUARY 4, 2020

**Program:** Trust Fiduciary Train Wrecks: Causation & Casualties

**Presenter:** Tom E. Simmons, J.D.

### TUESDAY, MARCH 3, 2020

**Program:** A Review of Tax Reform and Recent Updates

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

### THURSDAY APRIL 23, 2020

TBA-Membership Happy Hour Social

### ANNUAL MEETING TUESDAY, MAY 5, 2020

**Program:** TBA

**Presenter:** Kit Mac Nee, CFP® CRPC® MDM Group; Morgan Stanley Wealth Management