

SIouxLAND

ESTATE PLANNING COUNCIL

Welcome to the Siouxland Estate Planning Council.

We hope you enjoy the programs scheduled for 2020-2021, and find our professional networking opportunity rewarding.

BOARD MEMBERS

Executive Board:

President	Anthony Lamb
Vice President	Karrie Hruska
Treasurer	Jeff Welsh
Membership	Adam Dean
Secretary	Nic Nelson

Representatives:

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

MEMBERSHIP

A membership application can be found on our website: 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

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National Association of Estate Planners & Councils

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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, and 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

2020-2021 SCHEDULE

Location: Delta Hotel by Marriot
South Sioux City Riverfront
385 E. 4th 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 1, 2020

Program: Overview of the SECURE Act (web presentation)
Presenter: Luran N. Randazzo, CPA, Assistant VP- Stifel

WEDNESDAY, OCTOBER 7, 2020

Program: TBA (collaboration with Security National Bank)
Presenter: Charles D. "Skip" Fox IV, Partner-McGuire Woods

TUESDAY, NOVEMBER 3, 2020

Program: Veteran's Affairs
Presenter: Joseph E. Twidwell
Senior VP & Trust Officer-Security National Bank

TUESDAY, JANUARY 5, 2021

Program: Estate Recovery Issues
Presenter: Ben Chatham-Iowa State Recovery

TUESDAY, FEBRUARY 2, 2021

Program: Farm Management Issues
Presenter: Dan Kriener

TUESDAY, MARCH 2, 2021

Program: A 2021 Agricultural Tax Law Update
Presenter: Kristine Tidgren- Director of CALT, Adjunct Assistant Professor, Agricultural Education & Studies

APRIL 2021

TBD-Membership Happy Hour Social

ANNUAL MEETING TUESDAY, MAY 4, 2021

Program: TBA
Presenter: Susan Rounds, Senior Wealth Strategist-Deutsche Bank