

Parkersburg Area Community Foundation
P O Box 1762
Parkersburg, WV 26102

Current Issues in Estate Planning

a continuing education seminar for professional advisors

Wednesday, May 24, 2017
Parkersburg Country Club
Vienna, West Virginia

Charles D. “Skip” Fox, IV

Currently a partner at McGuire Woods LLP of Charlottesville, VA; formerly with Schiff Hardin in Chicago, Skip Fox is a nationally recognized expert on a wide range of estate planning issues. He has worked with many clients on matters involving planning for families with closely held businesses, including ownership succession issues; the use of family limited partnerships, limited liability companies, and other techniques to transfer wealth at significantly reduced transfer tax costs; and counseling families on the appropriate uses of family offices. Mr. Fox previously directed Schiff Hardin’s highly regarded program for producing formbooks for banks and trust associations in more than twenty states. He widely publishes in distinguished periodicals, journals, and books, and he lectures annually at numerous seminars on estate planning and for organizations nationwide.

Mr. Fox received his bachelor’s degree from Princeton University, his master’s from Yale University, and his J.D. from the University of Virginia School of Law. He is a member of the American Bar Association Section of Real Property, Probate and Trust Law; the Chicago Bar Association; and the Duke University Estate Planning Council. Mr. Fox was also named a Fellow of the American College of Trust and Estate Counsel and is regularly listed among the *Best Lawyers in America*.

This Seminar is offered by the

Marietta Community Foundation (MCF)

www.mcfohio.org
(740) 373-3286

Mid-Ohio Valley Estate Planning Council

(304) 428-4438

Parkersburg Area Community Foundation & Regional Affiliates of Doddridge, Ritchie & Little Kanawha Area (PACF)

www.pacfww.com
(304) 428-4438

Current Issues in Estate Planning is an **intermediate** level seminar and will be most valuable to those with at least a fundamental understanding of estate planning issues.

However, there are no prerequisites for attendance and no advanced preparation is required.

Delivery Method: Group-Live.

Seminar Outline

Arrival-Registration & Continental Breakfast	8:30 - 8:50 am
Recent Developments (10 min. break ea. hour)	9:00 -11:00 am
Estate Planning without an Estate Tax	11:10 am - Noon
Lunch	Noon – 1 pm
Retirement Benefits	1:00 - 2 pm
Asset Protection Planning	2:10 - 3 pm.
Charitable Planning Landscape-Tales from the Crypt	3:10 – 4 pm
Questions & Answers / Wrap Up	4:00 - 4:30 p.m.

There will be periodic breaks & snacks during the day. Seminar concludes at 4:30 p.m.

**2017 Lead Sponsors: Astorg & Jones, CPA's
Peoples Bank --- WesBanco Bank --- United Bank**

Professional Education Credits

**Unless otherwise noted, credit requests pending at this time*

Supreme Court of Ohio Cont. Legal Ed. – 5.75 hrs CLE requested
WV Mandatory Legal Education Comm. - 7 hrs CLE approved (1 hr Ethics CLE)

Accountancy Board of Ohio – 7 hrs requested
Nat'l Assoc. State Boards of Accountancy (WV, Subject: taxes) - 7 hrs

Ohio Department of Insurance Continuing Education Credits – 7 hrs requested
Insurance Commissioner Board of Insurance Agent Education 7 hrs requested

Institute of Certified Bankers - various banking CEU, inc. CTFA – 7 hrs requested

Certified Financial Planners Board of Standards – 7 hours CFP requested

**Parkersburg Area Community Foundation is a member of the National Association of State Boards of Accountancy (NASBA)'s WV Roster. State boards of accountancy have final authority on the acceptance of individual course for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Ave. North, Suite 700, Nashville, TN, 37219-2417.

Web site: www.nasba.org. Credit granted based on a 50 min. / hr. For more information about administrative policies such as complaint and refund, contact Parkersburg Area Community Foundation office at 304.428.4438.

Registration deadline: **May 22, 2017**
Enrollment fee inc. course materials, continental breakfast, snacks and lunch.

Course fee is \$250; discounted to \$200 for Mid-Ohio Valley Estate Planning Council members.

Registrants who cancel by May 19 are eligible for a full refund. No refunds possible after that date.

To register, complete form below and mail it with your check for \$250 enrollment fee (**\$200 if a MOVEPC member**) to:

Mid-Ohio Valley Estate Planning Council
c/o PACF
P.O. Box 1762
Parkersburg, WV 26102

Online payment instructions on registration form below

Please Register Me for **Current Issues in Estate Planning**

Wednesday, May 24, 2017 at the Parkersburg Country Club

Name: _____ Firm: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ Fax: _____ Email: _____

Profession/Field: _____ Please list any specific dietary restrictions or requests _____

Please list any specific type of continuing education credit desired if it is not shown above _____

Mail this form with \$250* registration fee to: **Mid-Ohio Valley Estate Planning Council, c/o PACF
P.O. Box 1762, Parkersburg, WV 26102-1762**

***\$200 if you are a MOVEPC member** (Annual MOVEPC Dues are \$75 and can be paid/mailed in conjunction with this event)

To pay by credit card, **add \$10 for processing** to the appropriate fee (**\$210 member/\$260 non-member**). Use the following link or copy and paste url: www.pacfww.com/MOVEPC (note-while online form uses word, "donation," course expense is not tax-deductible).

If paying by credit card, please email this form to info@pacfww.com and advise payment was made online.

Questions? Call 304.428.4438.