

Current Issues in Estate Planning

a continuing education seminar for professional advisors

Thursday, May 24, 2018
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
Planning Under the 2017 Tax Act & Recent Dev. (10 min. break ea. hour)	9:00 - 11:00 am
Recent Developments	11:10 am - Noon
<i>Lunch</i>	<i>Noon – 12:50 pm</i>
Issues in Fiduciary Litigation	12:50 – 1:50 pm
Charitable Planning	2:00 – 2:50 pm.
Ethical Considerations in Dealing w/Closely Held Businesses	3:00 – 3:50 pm
Conclusions/Questions & Answers / Wrap Up	3:50 - 4:20 p.m.

There will be periodic breaks & snacks during the day. Seminar concludes by 4:20 p.m.

**2018 Lead Sponsors: Astorg & Jones, CPAs --- Bowles Rice LLP
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Professional Education Credits

**Unless otherwise noted, all 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 (1 hr Ethics CLE) granted

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

Ohio Department of Insurance Continuing Education Credits – 7 hrs *requested*
Insurance Commiss. WV Board of Insurance Agent Education-7 hrs *requested*

ABA Professional Certifications (formerly IEB) - various banking (CTFA, CISP, CRSP) – program submitted for review – 7 hours granted***

Certified Financial Planners Board of Standards – 7 hours CFP granted

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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.

* Current Issues in Estate Planning-2018 Mid-Ohio Valley Estate Planning Council Workshop has been approved for 7 CISP, 7 CRSP, 7 CTFA credits. This statement should not be viewed as an endorsement of this program or its sponsor."

Registration deadline: **May 21, 2018**
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 may request a full refund. No refunds are 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 form below**

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

Thursday, May 24, 2018 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.pacfwv.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@pacfwv.com and advise payment was made online.

Questions? Call 304.428.4438.