TO: EPCONU
FAX:
FROM: EPCONU
FAX: (435) 787-2236

ESTATE PLANNING COUNCIL OF NORTHERN UTAH

Program Schedule

2012-2013

AN ASSOCIATION OF SERVICE PROFESSIONALS

Scheduled Programs & Speakers

Meeting Times:
11:30 a.m.-12 noon: Lunch will be served
12 noon to 1 p.m.: Speaker presentation

Meeting Location:
The Copper Mill Restaurant
55 North Main
Logan, Utah 84321

Date: Tuesday, September 11, 2012
Speaker: Jay Edgington, Contango Capital
Topic: Business Succession Planning

Date: Thursday, September 27, 2012
Event: EPCONU Golf Tournament
Where: Logan Golf & Country Club

Date: Tuesday, October 9, 2012
Speaker: Jerry Borrowman, CLU, CHFC, CAP, MSFS,
Topic: Innovative Strategies for Charitable Giving

Date: Tuesday, November 13, 2012
Speaker: Keith Woodwell, Director of Utah Division of Securities
Topic: Job Act Impact on Financial Professionals

Date: Tuesday, December 11, 2012
Speaker: Susan Grassli, JD & Sue Luman, GBS Benefits, Inc.
Topic: Health Care Reform & Compliance

Date: Tuesday, January 8, 2013
Speaker: Cook Martin Poulson, P.C.
Topic: Tax Law Update

Date: Tuesday, February 12, 2013
Speaker: Henry Whiffen, MS, CFP, AEP
Topic: Seven Ways to Help High Net Worth Clients Profit Through Philanthropy

Date: Tuesday, April 16, 2013
Speaker: Senator Lyle Hillyard, JD
Topic: Utah Legislative Update

Date: Tuesday, May 14, 2013
Speaker: Peck Hadfield Baxter & Moore
Topic: Protecting Your Personal Assets from Litigation

Statement of Purpose

The Estate Planning Council of Northern Utah is an association of professionals who are directly involved in the estate planning process and who are personally active in estate planning. This generally includes Attorneys, Certified Public Accountants, Financial Planners, Life Insurance Agents, Investment Advisors, Trust Officers, and Charitable Giving Advisors.

The Council serves a two-fold purpose. First, it provides an educational opportunity to learn the intricacies and applications of complimentary professions. At each monthly meeting, professional speakers share their experience and planning techniques and discuss the most recent developments in estate planning. Secondly, professional friendships and networking are facilitated.

Estate Planning Council Officers

Officers:

President: **Mitchell Moncur, CPA**
Jones Simkins, PC
1011 W. 400 N.
Suite 100
Logan, UT 84321
(435) 752-1510 x127
mmoncur@jones-simkins.com

Vice President: **Jason Nelson**
Zions Bank
460 N. Main
Logan, UT 84321
(435) 757-2470
jason.nelson@zionsbank.com

Secretary: **Jeff Anderson, IAR**
Transamerica Financial Advisors, Inc
Transamerica Financial Group
1011 W. 400 N. Suite 120
Logan, UT 84321
(435) 753-7942
jeff.anderson@tfaconnect.com

Treasurer: **Jared Ripplinger, CPA**
Cook Martin Poulson, P.C.
632 N Main
Logan, UT 84321
(435) 750-5566
jripplinger@cookmartin.com

Advisory Board:

Todd Hallock, JD: (435) 753-2335
Past President/Chair
Daniel Watkins, JD: (435) 787-9700
Randy Fischer: (435) 752-4427

Registration

Please complete and return this registration form with your check payable to: **"Estate Planning Council of Northern Utah**." Mail your check to Jared Ripplinger, Cook Martin Poulson, P.C., 632 N. Main, Logan, Utah 84321.

NAME ____________________________________

FIRM _____________________________________

STREET___________________________________

CITY___________________ STATE___________

ZIP _________ PHONE # ____________________

FAX # ____________________________________

E-MAIL ADDRESS __________________________

Occupation:

__ Attorney __ CPA / Accountant
__ Life Ins. Agent __ Financial Planner
__ Banker / Trust Officer __ Investment Advisor
__ Charitable Giving Advisor
__ Other______________________________________

UT Bar # (if applicable): _________________________

UT Insurance License # (if applicable):______________

CFP License # (if applicable): ____________________

Registration Fees:
Please enclose a fee in the amount of **$100** for the 2011-2012 program. If preferred, you may pay $25 at the door for each meeting attended.

The 2012-2013 fiscal year will cover the period September 1, 2012 to August 31, 2013

Continuing Education

One hour of continuing education credit is available for each monthly meeting for CPAs and Attorneys. ***However, if you are a Life/Health Insurance Agent you should know that there is no guarantee that a specific workshop will be approved for CE***. For continuing education questions, please contact Suzanne Poole at (435) 752-6496 or Suzanne@Independent401kAdvisors.com.

Disclaimer

The speakers provide educational information only and do not offer professional, legal, tax, or investment advice. Each attendee is responsible to perform their own due-diligence on planning techniques presented.

Free Lunch

To expand our network and membership, we welcome professionals, who have never attended before, to attend one luncheon for FREE.

Follow Us on Facebook & Linkedin

Facebook: http://tinyurl.com/EPCONU-Facebook
LinkedIn: http://tinyurl.com/EPCONU-Linkedin