To: EPCONU
Fax:
From: EPCONU
Fax: (435) 787-2236

ESTATE PLANNING COUNCIL OF NORTHERN UTAH

Program Schedule

2013-2014

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 10, 2013**
Speaker: **Richard Broadbent, LUTCF, LPRT**
Topic: **Current Health Reform Guidelines**

Date: **Thursday, September 19, 2013**
Event: **EPCONU Golf Tournament**
Where: **Birch Creek Golf Course Smithfield, Utah**

Date: **Tuesday, October 8, 2013**
Speaker: **Fraser Nelson, Executive Director, Community Foundation of Utah**
Topic: **Philanthropy in Utah**

Date: **Tuesday, November 12, 2013**
Speaker: **Steven Chambers, JD**
Topic: **Asset Protection: Exemption Planning & Avoiding Fraudulent Transfers**

Date: **Tuesday, December 10, 2013**
Speaker: **Jerry Borrowman, CLU, CHFC, CAP, MSFS**
Topic: **Eight Common Mistakes that Professionals Make With Life Insurance**

Date: **Tuesday, January 14, 2014**
Speaker: **Saunders, Wansgard & Associates**
Topic: **Tax Law Update**

Date: **Tuesday, February 11, 2014**
Speaker: **Henry Whiffen, MS, CFP, AEP**
Topic: **The Charitable Remainder Trust (CRT)**

Date: **Tuesday, March 11, 2014**
Speaker: **Sterling Petersen, Custom Fit Director, BATC**
Topic: **Customer Service -- “Give’em the PICKLE!”**

Date: **Tuesday, May 13, 2014**
Speaker: **Senator Lyle Hillyard, JD**
Topic: **Utah Legislative Update**

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: **Jason Nelson**
Keystone Wealth Management
595 S Riverwoods Pkwy. Ste. 170
Logan, UT 84321
(435) 713-4220
jason@keystone-wealth.com

Vice President: **Daniel Watkins, JD**
Peck Hadfield
399 N. Main, Suite 300
Logan, UT 84321
(435) 787-9700
dwatkins@peckhadfield.com

Secretary: **Jeff Anderson, IAR**
Transamerica Financial Advisors, Inc
Transamerica Financial Group
1011 W. 400 N. Suite 120
Logan, UT 84321
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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:

Mitchell Moncur, CPA: (435) 752-1510 x127
Past President/Chair
Randy Fischer: (435) 752-4427
Bob Larsen: (435) 752-9493
Rob Smith, JD: (435) 752-1100

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 2013-2014 program. If preferred, you may pay $25 at the door for each meeting attended.

The 2013-2014 fiscal year will cover the period September 1, 2013 to August 31, 2014

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 Kris Lund at (435) 752-6496 or Kris@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.

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