

Estate Planning Council of Seattle

EPC Seattle May 18th Quarterly Dinner Meeting &

Annual Business Meeting

4:30pm - 6:00pm

Agenda

4:00pm - Networking

4:45pm - Council Updates:

- Council Year In Review - Jolene Cox
- Estate Planning Seminar 2022 - Johanna Coolbaugh
- Treasurer's Report - Dan Halos
- Vote on new slate of officers (see below)

Presentation - PSBJ Author Spotlight - This year we'd like to spotlight a few of our authors by inviting them to speak!

Sharon Perlin – Wells Fargo Private Bank "Opinion: How much is enough? Questions to ask about inheritance" (this article is from the 2020 insert)

Sarah Bowman - K&L Gates "How your fast-growing business can affect your family's future finances and estate plan"

Mike Teramoto - BECU Trust Services "Benefits that a corporate trustee can provide"

Sherry Bosse Lueders - Stacey L. Romberg, Attorney at Law "Digital footprint after death"

Greg Pittman - Helsell Fetterman LLP "In Transit - The impact of moving on your estate plan (COVID has prompted people to move) - state estate taxes, probate processes"

*All articles can be viewed here [Document Library - Estate Planning Council of Seattle \(epcseattle.org\)](https://www.epcseattle.org/document-library)

We are pleased to announce the slate for the 2022-2023

*Voting to occur during the 5/18 meeting

President - Dan Halos, ChFC, CLU - The Bailey Group

President Elect - Debra Smiley, CTFA - Laird Norton Wealth Management

Treasurer - Teresa Byers, JD - Odgen Murphy Wallace PLLC

Secretary - Allison Kollack, CPA, MST - King & Oliason PLLC

Immediate Past President - Jolene Cox, CPA - Deloitte Tax LLP

Executive Committee 1 Year Term - Elizabeth McGrath, CFP, CTFA - Key Private Bank

Executive Committee 1 Year Term - Chris Downing, CFP - Greene Wealth Management

Executive Committee 2 Year Term - Sarah Berkenwald, JD - Jeppesen Gray Sakai

Executive Committee 2 Year Term - Nathaniel Rothbauer, CPA - Ascent Private Capital Management

Seminar Chair - Johanna Coolbaugh & Co-Chair - Chad Proctor

Board Members Rolling Off - Thank you for your years of service to the council.

Steven Schindler, JD - Perkins Coie

Kim Cacace, CTFA - BNY Mellon Wealth Management

Anna Cashman, JD - KHBB Law PLLC

May 2022 Quarterly Dinner Meeting

RSVP Now for this Event

Date: Wednesday, May 18, 2022

Time: 4:30pm - 6:00pm

Location: Virtual

Speaker: PSBJ Author Spotlight

Every year the members of The Estate Planning Council of Seattle are asked to volunteer their expertise by writing an article for the Puget Sound Business Journal Estate Planning Insert.

This year we'd like to spotlight a few of our authors by inviting them to speak at our May 18th Dinner Meeting!

Speaker Line-Up:

Sharon Perlin – Wells Fargo Private Bank "Opinion: How much is enough? Questions to ask about inheritance" (this article is from the 2020 insert)

Sarah Bowman - K&L Gates "*How your fast-growing business can affect your family's future finances and estate plan*"

Mike Teramoto - BECU Trust Services "*Benefits that a corporate trustee can provide*"

Sherry Bosse Lueders - Stacey L. Romberg, Attorney at Law "*Digital footprint after death*"

Greg Pittman - Helsell Fetterman LLP "In Transit - The impact of moving on your estate plan (COVID has prompted people to move) - state estate taxes, probate processes"

Agenda

***This event will be on Zoom**

4:30pm ~ Welcome - Networking - Elections & Treasurer's Report

5:00pm ~ Speaker Introductions & Presentations (each author will have have 10 minutes to review their article)

5:50pm ~ Q&A

6:00pm ~ Adjourn