

6th Annual Estate Planning Forum & Update

The Southern Minnesota Estate Planning Council Presents

"Shakespeare at the Ramada"

Thursday, September 17, 2015

8:30am - 4:30pm

8:30am Registration

9:00am Welcome & Overview

Lunch Provided

Location: Ramada Inn
1500 E College Drive, Marshall, MN 56258

Fee: \$25 prepaid; \$35 at the door - checks only

RSVP By: September 15, 2015
Darcy Schmidt 507.354.2161
recept@thelegalprofessionals.com

***Application Submitted for
6.5 CLE Credits



Act I

9:10am - 9:40am

Scene I: "Hell Is Empty and All the Devils are Here"
Tax, Legislative, and Medical Assistance Updates
Steven Franta & Lauren Fink

9:40am-10:30am

Scene II: "Parting is Such Sweet Sorrow"
The Death of a Spouse
Shari Fischer & Nicole Schmiesing

10:40am-11:30am

Scene III: "Some Have Greatness Thrust Upon Them"
Charitable Giving
Leah Gilbert & Lisa Pluto

Intermission

Act II

12:10pm-1:00pm

Scene I: "Strong Reasons Make Strong Actions"
Estate Planning 101
R. Paul Goode & Andrew Meyer

Scene I: "In Cases of Defense 'Tis Best to Weight the Enemy More Mighty Than He Seems"
Asset Protection
Hannon T. Ford & Bridget Scrabeck

1:10pm-2:00pm

Scene II: "By the Pricking of My Thumbs, Something Wicked This Way Comes"
Medical Assistance 101
Lauren Fink & Leah Gilbert

Scene II: "Though This Be Madness, Yet There is Method In't"
Defined Benefit Planning
Jennifer L.J. Gilk & Vern Vliet

2:10pm-3:00pm

Scene III: "Put Thy Money in Thy Purse"
Funding 101
Brian Gillis & Joseph Sanow

Scene III: "Ignorance is the Curse of God; Knowledge is the Wing Wherewith We Fly to Heaven"
Irrevocable Life Insurance Trust
Bill Sommerness & Steven Franta

Act III

3:10pm-4:00pm

Final Scene: "Merely Players"
Being a Team Player
Jennifer L.J. Gilk & Shari Fischer

Curtain Call 4:00pm Questions & Answers