

# FINANCIAL & ESTATE PLANNING CONFERENCE

## AGENDA

May 18, 2023

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8:15 am - 8:45 am	Registration & Breakfast	
8:45 am - 8:50 am	Welcome	
8:50 am - 10:20 am	Special Needs Trusts	John F. Hussell IV. Wooton, Davis, Hussell & Johnson
10:20 am - 10:30 am	Break	
10:30 am - 12:00 pm	Making Changes to Irrevocable Trusts	Christopher J. Winton, Esq. Ray, Winton & Kelley
12:00 pm - 12:30 pm	Lunch	
12:30 pm - 1:00 pm	Legislative Update	Tom Heywood, Esq. Bowles Rice LLP
1:00 pm - 1:10 pm	Break	
1:10 pm - 2:10 pm	Small Business Planning Issues	JE White, Esq. Jackson Kelly PLLC
2:10 pm - 2:20 pm	Break	
2:20 pm - 3:20 pm	Trust Legislation	Scott Cunningham, Security National Trust Company  Ben Beakes, Three Point Strategies
3:20 pm - 3:30 pm	Break	
3:30 pm - 5:00 pm	Panel – Hot Topics and Discussion of Items of Interest to Estate Planners	Chris Winton with panelists
5:15 pm - 6:30 pm	Reception & Dinner (For Charleston Estate Planning Council members and paid guests)	