

2023 Financial and Estate Planning Seminar

Plans are being finalized for the 2023 Financial and Estate Planning Seminar to be held Thursday, May 18 at Edgewood Country Club in Charleston. This agenda is subject to change. This annual event sponsored by the WV Bankers, WV State Bar Probate Law Committee and WV Society of CPAs, attracts participants from bank trust departments, CPAs, insurance agencies, financial planners and attorneys and features the latest and most current estate planning techniques. Your company has a unique opportunity to network with some of the top professionals in West Virginia in these fields.

There is no other event in West Virginia that attracts all these groups of professionals.

Special Needs Trust

John F. Hussell IV., Wooton, Davis, Hussell & Johnson, PLLC

Making Changes to Irrevocable Trust

Christopher J. Winton, Esq., Ray, Winton & Kelley

Legislative Update

Tom Heywood, Esq., Bowles Rice LLP

Small Business Planning Issues

JE White, Esq., Jackson Kelly PLLC

Trust Legislation

Scott Cunningham, Security National Trust Company

Ben Beakes, Three Point Strategies

Panel – Hot Topics and Discussion of Items of Interest to Estate Planners

Chris Winton with panelists

If you have a product you would like to showcase or if you wish to be a sponsor, please take advantage of this opportunity, and complete the application form now. Both the exhibit and sponsorship opportunities include one free registration (\$295.00 value). For additional information, please email Amanda Cunningham at acunningham@wvbankers.org or call 304-343-8838.

Location: Edgewood Country Club, 1600 Edgewood Drive, Charleston WV 25302, www.edgewoodcc.com. The program is one day and includes breakfast and lunch. *If you plan to stay for reception & dinner, please e-mail Jennifer Willits at jwillits@summitfgi.com. This is not included; the cost is \$75 per person. The seminar begins at 8:15am and adjourns at 5:00 pm.*

Application for Exhibitors and Sponsors

____ Exhibitor **\$445** includes exhibit space and full registration for one person to attend the seminar, as well as recognition on signage and in promotional material.

As an exhibitor, will you need a table? _____ Electric? _____

____ Sponsor **\$445** includes recognition on signage, promotional material, and seminar registration for one.

Attendee Name _____

Company/Firm _____

Address _____

Phone _____ Email _____

****If you have additional attendees, please register separately on the WV Bankers registration link by going to www.wvbankers.org and click on the seminar in the event calendar.***

Please email this form to Amanda Cunningham, acunningham@wvbankers.org by May 6, 2023. We will send you an invoice.