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Of
North Central Washington

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ESTATE
PLANNING
COUNCIL
OF NORTH CENTRAL WASHINGTON



2018-2019
ACADEMIC
YEAR

2018-2019 Faculty Schedule and Bios

September 13, 2018

5:30 p.m. to 8:00 p.m.
Wenatchee Golf & Country Club



Section 199A

This presentation addresses new Section 199A of the Internal Revenue Code as it applies to family holding companies owning rental real estate. Planning opportunities for maximization of this deduction are explored in spreadsheet mode.

James K. Treadwell
Attorney
Karr Tuttle Campbell

James K. Treadwell is a graduate of the University of Oregon School of Law who focuses his practice in the areas of estate planning and trust and estate administration. He has substantial experience in the structuring and implementation of estate tax value freeze techniques, including multi-tiered discount partnerships and limited liability companies, split interest trusts, private foundations, and the integrated use of life insurance and investment products in estate planning. Mr. Treadwell is a Fellow of the American College of Trust and Estate Counsel. He served on the executive committee of the RPPT Section of the WSBA and was the founding chair of the section's Probate Law Task Force.

October 11, 2018

5:30 p.m. to 8:00 p.m.
Wenatchee Golf & Country Club



**Tax Cuts and Jobs Act 2017—
It's More than an
\$11.2 Million Exclusion**

This presentation will provide an overview of the key changes in the 2017 Tax Act that impact individual taxpayers, estates, and trustees. Although the massive increase in the applicable exclusion may be top of mind for estate planners, we will also focus on the individual and trust income taxation changes that estate planners will want to remember as we plan for ourselves and our clients for the next seven years.

Kristi Mathisen, CPA, J.D.
Managing Director of
Tax & Financial Planning
Laird Norton
Wealth Management

Kristi Mathisen joined Laird Norton in 2006. She serves as a technical resource for client advisors and analysts, including helping to develop protocols that identify appropriate tax and financial strategies for the benefit of clients. Kristi is an attorney, a CPA and Personal Financial Specialist (PFS) with more than 25 years of finance-related experience. She earned a bachelor's degree in business administration with an accounting concentration from the University of Washington and a J.D. from the University of Washington School of Law. She is a member of the WSBA and King County Bar Associations. In addition, Kristi is a member of the Washington Society of CPAs and the AICPA.

November 8, 2018

5:30 p.m. to 8:00 p.m.
Wenatchee Golf & Country Club



**2018 Federal and State
Changes to Special Needs
Trust Rules and Other
Medicaid Issues**

This presentation will focus on the major changes to the rules and regulations relating to Special Needs Trusts that were separately promulgated in the Spring of 2018 by the Social Security Administration and the Washington State Health Care Authority.

Sean R. Bleck
Attorney
Sommer Tamblin
Isenhour Bleck

Sean Bleck makes the complex understandable. He is able to distill law and regulations so that his clients can proceed with confidence. He has been actively involved in the development of many of the governmental policies and regulations that affect clients. He is former Chair of the Elder Law Section of the Washington State Bar Association and former President of the Washington Chapter of the National Academy of Elder Law Attorneys. For many years Sean has been named as one of the city's best attorneys in *Seattle Magazine* and a "Super Lawyer" in *Law and Politics Magazine*. He is a graduate of Johns Hopkins University, Georgetown University Law School, and New York University, LL.M (Taxation).

2018-2019 Faculty Schedule and Bios

January 10, 2019

5:30 p.m. to 8:00 p.m.
Wenatchee Golf & Country Club



The Slayer Statute and Financial Exploitation of Vulnerable Adults

Elder Abuse cases are on the rise. During the past ten years in Washington state, reports to Adult Protective Services of abuse against vulnerable adults tripled from 14,400 to 42,000. Of the reported cases, 28,285 were determined worthy of investigation. This presentation will appeal to all professions represented in membership of the Estate Planning Council. It will provide a road map of strategies available to protect vulnerable adults.

Anna M. Cashman
Partner
Kutscher Hereford
Bertram Burkart

Anna Cashman's practice focuses on estate planning, taxation, probate, trust administration, and trust and estate litigation matters. She graduated from Seattle University School of Law, magna cum laude, and earned her Masters of Law in Taxation from the University of Washington. While in law school, Anna studied global human rights advocacy at the Mandela Institute at the University of the Witwatersrand School of Law in Johannesburg, South Africa, and was a legal clerk to the Honorable Richard McDermott of the King County Superior Court. Ann has served as a Young Lawyer Liaison.

February 7, 2019

5:30 p.m. to 8:00 p.m.
Wenatchee Golf & Country Club



Succession Planning for the Family Farm

This presentation will discuss issues related to estate and succession planning for family farms: from transfer tax considerations such as QFOBI and the Washington state farm deduction, to intangible planning issues such as determining control and "fairness" among the next generation. We'll review the fundamentals, and provide some creative solutions for helping ensure our clients can keep the family farm.

Sarah MacLeod
Shareholder
Lane Powell

Sarah MacLeod is a Shareholder on Lane Powell's Trusts & Estates Team and counsels individuals and high net worth families on estate and gift planning, estate and trust administration, and business succession issues. Sarah also counsels clients on philanthropic matters, including advising tax-exempt organizations on governance and tax-related issues, and individuals and families with respect to their charitable giving. Sarah is a Fellow of the American College of Trust and Estate Counsel and is consistently honored in The Best Lawyers in America© and Chambers High Net Worth publications. She received her J.D. from the University of Washington School of Law and her B.A., summa cum laude, from the University of Notre Dame.

May 9, 2019

5:30 p.m. to 8:00 p.m.
Wells House

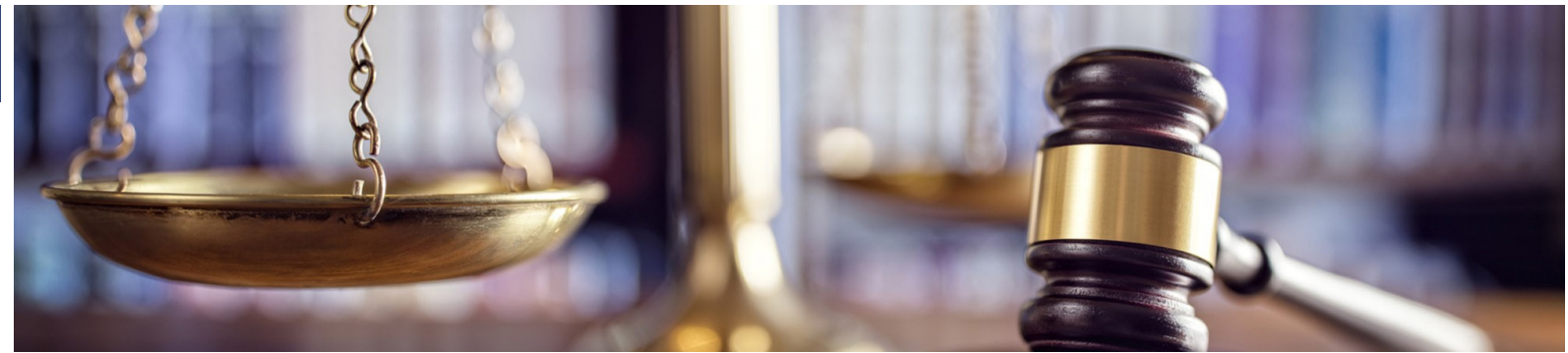


Spring Charity Showcase and Election of Officers & Directors

The Spring Charity Showcase is an event to highlight our non-profit charity members. Each of our charity members will have the opportunity to share stories about their organizations, their facts, people and outcomes.

This event is open to members of the NCW Estate Planning Council and their guests.

Delicious food and great beverages will be served.
This is going to be fun!



Membership Application and Renewal Form

I am: (check one)

- Renewing my membership
- Applying for new membership

Name: _____ Profession: _____

Address: _____

Phone: _____ Email: _____

Employer: _____

Membership Applications are reviewed upon submission by the Board of Directors. After completing the form above, please detach this portion of the brochure and mail your membership application and annual dues of \$250 (\$275 for attorneys) to:

Estate Planning Council of North Central Washington
P.O. Box 881
Wenatchee, WA 98807-0881

Active members shall qualify under one of the following professions:

Attorneys. Standards that must be met:

- Washington State Bar membership.
- Active attorney in good standing.

Accountants. Standards that must be met:

- Licensed member of the Washington Society of Certified Public Accountants or American Institute of Certified Public Accountants.
- Active CPA in good standing.

Insurance Professionals. Standard that must be met:

- Licensed, and a member of the National Association of Insurance and Financial Advisors (NAIFA).

Trust Officers or Trust Advisors. Standard that must be met:

- Active employment as a Trust Officer or Trust Advisor or Financial Advisor.

Financial Advisors. Standard that must be met:

- Successful completion of the Series Seven Certification for Planned Giving Officers or Planned Giving Advisors.

Planned Giving Officers or Advisors. Standard that must be met:

- Active employment as Planned Giving Officer or Planned Giving Advisor.

Directors of Public Charities. Standard that must be met:

- Executive Director of a Public Charity or Charitable Foundation.