

**Martin County Estate Planning Council presents its
34th Annual Estate Planning & Tax Seminar
May 19, 2017**

- 8:15 am - 8:45 am Registration and Continental Breakfast sponsored by **Bessemer Trust**
- 8:45 am - 8:55 am Lisa Clasen, President, Martin County Estate Planning Council update
- 9:00 am – 12:00 pm **MARK PARTHEMER, ESQ.**, Senior Fiduciary Counsel, Bessemer Trust
and
SASHA KLEIN, ESQ., Partner, Ward Damon, PL
- Florida Law Update
 - Digital Assets
 - Current Developments
 - Advanced Estate Tax Planning
 - Wrapping It All Together-Holistic Planning Needed
- 12:00 pm - 1:00 pm Lunch provided - Sponsored by **United Way of Martin County**
- 1:00 pm - 2:00 pm **KAYE HARWOOD, EXAM MANAGER**, FINRA Fla. District Office
- Prevalence of Senior Fraud
 - FINRA Foundation Research
 - Statistics and Trends from Helpline
 - Best Practices
 - FINRA Rule 2165 and amendments to Rule 4512
 - Outreach and Investor Alerts
 - Resources
- 2:00 pm – 3:00 pm **SCOTT ROADS, MANAGING PARTNER**, Spectra Investment Management
- Capital Market Update: Divergence 2.0
 - Industry Trends
 - Thoughtful Questions for Client Meetings
- 3:00 pm – 4:00 pm **MELISSA "LISA" FRICKE, VICE PRESIDENT, ESTATE SETTLEMENT OFFICER**, Wilmington Trust
- Estate Settlement and Planning for Personal Property
 - Plan for Your "Stuff" and Watch Your Language!
 - Managing Expectations – Second marriages, Children and Methods of Distribution
 - Artwork, Collections (toy soldiers?) - Valuations
 - 706 Audits
 - Examples
- 4:00 - Social Hour Sponsored by **UNITED WAY OF MARTIN CO. and BESSEMER TRUST**