

Fifth Annual MARTIN COUNTY ESTATE PLANNING COUNCIL SYMPOSIUM

JANUARY 21, 2020 • 8:30AM - 3:30PM

Presented by:



Treasure Coast Hospice

A TREASURE HEALTH SERVICE

Hosting Sponsor:

Kane Center

COUNCIL ON AGING OF MARTIN COUNTY, INC.



NATIONAL ASSOCIATION OF
Estate Planners & Councils



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THE CHARLES AND RAE KANE CENTER

Langford Theatre • 900 S.E. Salerno Road • Stuart, FL 34997

AGENDA:

8:30AM - Registration and Reception, light breakfast provided

9:00AM - Introduction: Stephen Pinnacoli, President, Martin County Estate Planning Council

9:10AM - Overview of Programs and Services provided by Treasure Coast Hospice:

Presenter: K. Murray Fournie, CFRE, FAHP, Treasure Coast Hospice

9:30AM - Importance of Planning for End of Life and Advanced Care Directives:

Presenter: Treasure Coast Hospice

10:15AM - Estate Planning Documents to Know: Presenter: Peggy Wood, Esq.,

AEP®, McCarthy Summers Wood Norman Melby & Schultz, P.A.

11:00AM - Implications of the 2018 Tax Changes:

Presenter: Sarah Gaymon, CPA, HBK, CPAs and Consultants

12:00PM - Lunch provided: Welcome remarks from Host Sponsor,

The Council on Aging of Martin County, Inc.

1:00PM - Elder Law and Medicaid Planning: Presenter: Joannie Rodriguez, Esq.,

The Estate, Trust & Elder Law Firm, P.L.

1:45PM - Expensive US Asset Prices: The risks, tension and opportunities:

Presenter: Scott Roads, Spectra Investment Management, LLC

2:45PM - I Wanted That! Dealing with Personal Property in your Will:

Presenter: Melissa Fricke, Managing Director, Wilmington Trust

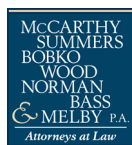
3:15PM - Closing Remarks

THE SYMPOSIUM IS OPEN TO THE PUBLIC.

Register online at: www.mcepc.net/events/event/18705

or call Matt King (772) 324-3321 or email: mcepcsymposium@gmail.com

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