



Hoosier Hills Estate Planning Council presents  
**2019 Estate Planning Day**

**Continuing Education Bargain of the Year!**

**All-Star Speakers!**

**Rodney Retzner**  
**Marvin Hills**  
**Susan Hunter**  
**Polly Dobbs**  
**Brian Melvin**  
**Patrick Olmstead**

**Thursday, May 9, 2019**

**Monroe Convention Center**  
**302 S. College Avenue**  
**Bloomington, Indiana 47403**

Seating is Limited. Register early to guarantee participation.  
CE is pending for 6.0 hours continuing education credit for  
Insurance, CPA/CFP and 6.0 hours CLE which includes 1 hour Ethics CE.

[www.hhepc.org](http://www.hhepc.org)

## **HHEPC 2019 ESTATE PLANNING DAY REGISTRATION**

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|--|--|
| <input type="checkbox"/> I am a HHEPC member,<br>Seminar Fee: <b>\$60.00</b>                                     | <input type="checkbox"/> I am not a HHEPC member,<br>Seminar Fee: <b>\$150.00</b>  |
| <input type="checkbox"/> I am a HHEPC member,<br>Seminar Fee plus<br>Membership renewal 2019-20: <b>\$150.00</b> | <input type="checkbox"/> I am not a HHEPC member,<br>Seminar Fee plus 2019-20 membership: <b>\$200.00</b><br><input type="checkbox"/> *Optional Printed Materials (deadline April 25) <b>\$20.00</b> |

*\*Materials will be provided in electronic format to all registrants. If you would like printed materials, please select the "Print Materials" option when registering.*

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### **AGENDA**

- 7:30 – 8:20 Registration/Continental Breakfast/Sponsor Booth Visitation
- 8:30 – 9:30 Rodney Retzner, Attorney , Kreig DeVault– *Avoiding Estate Litigation*
- 9:40 – 10:40 Marvin Hills, CPA – Crowe Horwath – *Life Cycle of an S Corporation*
- 10:40 – 11:00 Break – 20 minutes
- 11:00 – 12:00 Susan Hunter, Attorney, Hunter Law Office – *Insights for Successful Practice Management*
- 12:00 – 1:00 LUNCH
- 1:00 – 2:00 Polly Dobbs, Attorney, Dobbs Legal Group, LLC – *How Estate Planning is Different for Farmers – What You Need to Know*
- 2:00 – 2:15 After Lunch Break – 15 minutes
- 2:15 – 3:15 Brian Melvin, Senior Wealth Manager, United Capital – *Savvy Social Security Planning*
- 3:25 – 4:25 Patrick Olmstead, Jr. Attorney, Patrick Olmstead Attorney at Law – Ethics Issues In Estate Planning and Administration
- 4:25 – 4:35 Closing Comments

### **REGISTRATION FORM – deadline April 25, 2019**

Name \_\_\_\_\_

Firm/Business \_\_\_\_\_

Professional License Number \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone/Fax \_\_\_\_\_

Email \_\_\_\_\_

### **PAYMENT INFORMATION – Register on-line at [www.hhepc.org](http://www.hhepc.org) - or**

Amount enclosed \$\_\_\_\_\_ (Make check payable to HHEPC). Mail check and registration form to HHEPC, c/o Jessica Hidalgo, 813 W. 2<sup>nd</sup> St., Seymour, Indiana 47274.