



Hoosier Hills Estate Planning Council

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Hoosier Hills Estate Planning Council • c/o Jessica Hidalgo • 812-405-1734 • 813 West 2nd Street. • Seymour, In 47274

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HHEPC 9/17/20 Seminar Outline For Panel

Title: Estate Planning In a Pandemic: Lessons Learned and Tips

Panelists:

Rodney Retzner, Partner, Kreig DeVault

Dave Mitchell, Senior Vice President, CIO German American

Dawn Craft, Portfolio Manager, German American

12:30-12:35 Introduction

- Emergency laws enacted that have affected client's estate planning

12:35 – 1:05 Rodney Retzner

- Challenges of representing estate planning clients remotely
- Emergency orders affecting estate planning procedures
- Special ethical considerations when representing clients in an emergency

1:05 – 1:30 Dave Mitchell and Dawn Craft

Current Outlook

- Unemployment still about 10%.
- U.S. Growth (as measured by GDP) fell 5% in Q1 and 31.7% in Q2.
- Short-term interest rates likely to be relatively flat for the foreseeable future.
- Geo-political risks remain elevated (Tariffs, North Korea, Syria, Iran, China, Russia, etc).
- Presidential election – too close to call.
- Equity markets have rebounded to new highs.
- Constructive on equities for Investors with 5+ year time horizon.
- Challenging times for fixed income Investors

Learning Objectives:

Participants will learn how to navigate emergency laws enacted that have affected client's estate planning and the challenges of representing estate planning clients remotely.

Participants will learn of the emergency orders affecting estate planning procedures and the special ethical considerations when representing clients in an emergency.

Participants will also explore the current outlook on the financial prospects for the near future such as the unemployment rate, U.S. growth, short-term interest rates, Equity markets and fixed incomes.

Level of difficulty: Medium

**Rodney S. Retzner****Partner**

P: (317) 238-6256

F: (317) 636-1507

E: rretzner@kdlegal.com

Carmel Office

12800 North Meridian Street

Suite 300

Carmel, IN 46032-5407

Rodney Retzner is the Chair of the firm's Estate Planning and Administration Practice Group. His practice is concentrated in the areas of estate and business succession planning, estate and trust administration and estate and trust litigation. In the practice of succession planning, Mr. Retzner has worked with many closely-held family businesses in order to assist in the transition of the business to future generations with the least amount of impact as possible from taxation as well as family relationships. Mr. Retzner's practice in the area of estate planning has included work with individuals with nominal estates up to individuals with over a billion dollars in net worth.

PRACTICE AND INDUSTRY TEAMS

- Business, Acquisitions & Securities
- Energy and Public Utilities
- Estate Planning and Personal Services
- Fraternities and Sororities
- Tax
- Trust and Estate Litigation

REPRESENTATIVE EXPERIENCE

- Represented purchaser in negotiation and acquisition of a telecommunications company valued in excess of \$10 million.
- Responsible for the creation/transformation of a large trust holding interest in a closely-held company into a private foundation with assets in excess of \$20 million; thereby allowing for greater impact on the communities served by that company through the private foundation.
- Representation in the estate and business succession planning of a successful nursing home developer with excess of \$20 million in assets and successful representation of the personal representative of the estate in transitioning the assets through estate administration and estate litigation through the ultimate beneficiaries.
- Worked with various financial institutions and other creditors in the filing and prosecution of

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claims against deceased estates and trusts as well as against non-probate transferees, including opening estates and administering estates as a creditor and defending creditors against various asset protection devices implemented by debtors.

- Involved in litigation involving disputes with respect to will contests and trust litigation representing both plaintiffs and defendants' estate and trusts in litigation of all types related to the contest of trusts and wills as well as disputes involving distribution and other prosecution and defense of claims. Mr. Retzner has navigated clients through such disputes up to and through the Indiana Court of Appeals.

EDUCATION

- University of Cincinnati College of Law, Cincinnati, Ohio (J.D., 1998)
 - Moot Court: Moot Court Board, 1996-1998; Corporate Law Fellowship, 1995-1998
- Rose-Hulman Institute of Technology, Terre Haute, Indiana (B.S. in Mechanical Engineering, *cum laude*, 1990)
- Navy Nuclear Power Program (M.S. in Nuclear Power, 1991)

BAR & COURT ADMISSIONS

- Indiana, 1998
- U.S. District Court for the Northern District of Indiana
- U.S. District Court for the Southern District of Indiana
- Florida, 2017

PROFESSIONAL ASSOCIATIONS

- American College of Trust and Estate Counsel - ACTEC (Member)
- Children's Museum of Indianapolis (Planned Giving Committee)
- Indiana University Maurer School of Law (Adjunct Professor - Trust and Estate Planning)
- Indianapolis Bar Association (Member)
- Executive Council of Estate Planning and Administration Section, Indianapolis Bar Association
- Indiana State Bar (Member)
- Council of Probate and Real Property Section, Indiana State Bar Association
- Probate Review Committee, Indiana State Bar Association
- Indianapolis Estate Planning Council (Member)
- Fishers Advisory Plan Commission and Board of Zoning Appeals, legal counsel
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AWARDS AND RECOGNITIONS

- Mr. Retzner is a Certified Estate Planning and Administration Specialist, certified by the Indiana State Bar Association's Estate Planning and Administration Specialty Certification Board
- Indiana Super Lawyers, 2009-2019
- Best Lawyers® 2018 Trusts and Estates "Lawyer of the Year" in Indianapolis

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Dave Mitchell

**German American Wealth Advisory
Group**

**Senior Vice President, Chief Investment
Officer**

Phone 812-437-7313

Dave has earned Bachelor of Science Degrees in Finance, Economics, and Management from the University of Southern Indiana. He has been managing personal, institutional, and foundation accounts and portfolios since 1986. Dave has served terms on the boards of the Vanderburgh Community Foundation, Community Foundation Alliance, and Evansville Association for the Blind. He has also served on the metro board of the YMCA of Southwestern Indiana since 2002.



Dawn Craft

**German American Wealth Advisory
Group**

Vice President, Portfolio Manager

Phone 812-355-6038

Dawn is a graduate of Indiana University Southeast with a Bachelor's Degree in Business Administration with a concentration in Economics and Public Policy and a Master's Degree in Business Administration. She has worked in the Trust and Financial Services Industry since 1995. Dawn is a member of the investment committee and is responsible for managing client portfolios. She has served on numerous community boards in several counties in Indiana in a variety of roles ranging from Treasurer to President. Dawn and her husband, Todd, reside in Bloomington, Indiana, and have three children, Cole, Carly and Camden.