

West River Estate & Financial Planning Council

Dear Current, Past, and Prospective Members:

On behalf of the West River Estate & Financial Planning Council Executive Committee, I would like to welcome you to our 2024 seminar luncheon series. We are excited to offer the seminars at the Journey Museum, 222 New York Street in Rapid City. Our lunches will be catered by Fork Real. We have some great speakers who have committed to presenting!

Enclosed you will find the 2024 WREFPC brochure which features the speakers and topics presented this year. Please feel free to share this with any of your colleagues who may be interested in joining the WREFPC. We also encourage you to invite guests to attend any of the seminars, and new for this year, each member is permitted 1 free guest attendance with registration by the member in advance. Additionally, members are permitted to bring guests during the season for an additional cost of \$30 per guest (lunch included), per seminar. The same guest is permitted to attend two seminars per year before joining as a member. The goal of permitting guests to attend is to increase the interest of our organization and increase our membership. Guest fees also help us to offset the costs of the venue and speakers. We will send membership information to guests after they've attended a seminar.

As a reminder, membership fees are due before the first event. The 2024 membership registration form is enclosed. This year we are offering our memberships (lunch included) at the cost of \$300 per individual and \$1,600 for a corporate membership (includes up to six people for one company). Any additional individuals can be added to a corporate membership for \$250 for each additional person.

We are looking for sponsors for the 2024 program year. Sponsoring is a great way to market your organization and another great way for WREFPC to raise funds to help keep our membership costs low. Sponsor logos will be featured on our website and will be announced at each presentation. The cost of the sponsorship is \$300, in addition to your membership fees. If you are interested in being a sponsor, please check the box on the enclosed brochure and include the payment with your membership fee. If you have any questions about being a sponsor, please feel free to contact our Executive Coordinator Tanya Antijunti at wrefpc@gmail.com. Thank you to our past sponsor organizations! We appreciate your support!

I'd like to thank the board members of the West River Estate and Financial Planning Council for their hard work in putting together a great line-up for our 2024 speaker series. Additionally, a big thank you to Tanya Antijunti for keeping us organized!

I'm looking forward to seeing you at our first 2024 event on May 21, 2024!

Sincerely,



Andy Bartling, FIC, LUTCF
WREFPC President

West River Estate & Financial Planning Council

2024 Season Registration Form

Season Details *New this Season!

- The Journey Museum, Gallery Room* (222 New York St., Rapid City)
- Tuesday's (5/21, 6/11, 7/16, 8/20, 9/17)
- 11:00am Networking Lunch*
- 11:30am-1:00pm Speaker Presentation
- Each member is permitted 1 free guest attendance w/ registration by member.*

Save the Dates

- **May 21:** The Private Family Trust Company, Directed Trusts & Other Powerful Alternatives
- **June 11:** Top 30 Best Practices When Advising Families with Special Needs Beneficiaries
- **July 16:** Estate Tax Exemption Sunset
- **August 20:** Local Panel: How to Talk to Your Clients About Charitable Giving
- **September 17:** Life Insurance Strategies to Enhance Estate Plans

Continuing education hours are not guaranteed—they must be reviewed and approved by your affiliated Board of Standards.

2024 Membership Registration

\$300 Per Individual Member

OR

\$1,600 for any six members from one Company, \$250 for each additional member over six.

Return this completed registration form w/ your check payable to:

West River Estate & Financial Planning Council

Mail to: **WREFPC at PO Box 2396 Rapid City, SD 57709. Return by Wednesday, May 8, 2024.**

Member Name:	Firm Name:
Address:	Phone:
Email:	Website:
Would you like your contact information added to our website? wrefpc.org <input type="checkbox"/> YES <input type="checkbox"/> NO	Professional Designations:

2024 Company Sponsorship

\$300 Per Company Sponsor

Sponsors are recognized in the annual program, at wrefpc.org, and at each event.

Yes, I would like to become a sponsor of WREFPC, please find my check for \$300 enclosed.

I would like more information on becoming a sponsor, please contact me.

**A BIG Thank You to last year's
2023 WREFPC Sponsors**

Black Hills Area Community Foundation

Casey Peterson, LTD

Financial Markets Inc.

First Interstate Bank—Wealth Management

First Trust Company

Ketel Thorstenson, LLP

South Dakota Community Foundation

South Dakota Trust Company LLC

Interested in Sponsorship?

*See an Executive Council Member or
the Executive Coordinator for details.*

WREFPC.ORG

**PO Box 2396
Rapid City, SD 57709**

**West River Estate &
Financial Planning Council**

2024 Speaker Series

WRE&FPC is an organization of Financial Planners, Trust Officers, Non-Profit Executives/Planned Giving Professionals, Accountants, Attorneys, and Life Underwriters in Western South Dakota.

We help members stay up to date with the ever changing laws and conditions affecting estate planning, business and personal taxation, and the problems of estate accumulation and conservation. Our goal is to offer continued education improving the knowledge of each member while encouraging the highest level of professional service to the public. WREFPC is a member of the National Association of Estate Planners & Councils.

Visit our website wrefpc.org for our full schedule of events. View detailed bios for all our speakers and find links to our sponsors, view our membership directory, download membership applications, and much more!

WREFPC.ORG

**PO Box 2396
Rapid City, SD 57709**

2024 Registration Details

An email registration will be sent to members prior to each event.

All members (and guests*) must RSVP for each speaker.

Location: The Journey Museum (222 New York St.)
Gallery Room

Time: 11:00am Networking Lunch
11:30am—1:00pm Speaker Presentation

2024 Executive Committee

President: Andy Bartling, Modern Woodmen of America
Vice President: Tammy Flores, First Interstate Wealth Management
Treasurer: Cara Boland, BankWest Investment Management & Trust
Secretary: Jesse Jangula, Ketel Thorstenson, LLP
Additional Board Members:
Barb Keene, Black Hills Area Community Foundation
Cale Fierro, Bangs McCullen Law Firm
Edward Bartling, Financial Markets Inc.
Lori Larson, Casey Peterson, LTD
Owen Wiese, Gunderson, Palmer, Nelson & Ashmore, LLP
Tamara Burke, Financial Benefits Inc.
Past President: Beth Massa, South Dakota Community Foundation

Guest Attendance

*New for the 2024 season, each member is permitted 1 free guest attendance with registration by member. Additionally, members are permitted to bring 2 guests during the season for \$30 per guest to be paid by cash or check at the door.

Members must RSVP for their guests.

Any individual guest may attend a maximum of 2 seminars per year before joining as a member.

Tuesday, September 17, 2024

Life Insurance Strategies to Enhance Estate Plans

Presented by:

Greg Holmgren,
CFP, CLU, ChFC, CAP
Head of Insurance & Estate Planning



Biography

Greg Holmgren is the Head of Insurance & Estate Planning for Freedom Financial Partners, a Registered Investment Advisor, located in St Paul, MN. There he works with the firm's wealthy clients and business owners to help them achieve their specific financial goals. He started with Freedom Financial after his retirement from New York Life Insurance Company at the end of 2023, after a 38-year career.

At New York Life, he was most recently the Advanced Agent Development Officer. He led a team that worked with top agents, their clients and their clients' professional advisors to enable these clients to overcome planning obstacles and achieve their specific financial goals. Greg and his team focused on creating and shaping the strategies that helped New York Life agents communicate with business owners and high net worth individuals; and design persuasive insurance-based planning solutions.

As a sought-after platform speaker, Greg still speaks to audiences around the country on financial strategies and key planning issues that can impact their lives.

With over 40 years of insurance industry experience, he brings a wealth of insightful and relevant knowledge to every situation. Greg holds a B.A. degree from Wheaton College in Wheaton, Illinois. He and his wife, Susan, live in Wichita, KS.

Tuesday, August 20, 2024

Local Panel: How to Talk to Your Clients About Charitable Giving

Jeff Partridge
LPL Financial Advisor
Partridge Financial
For Full Bio Visit:
partridgefinancial.com



Michelle Minnerath, CPA
Partner
Ketel Thorstenson LLP
For Full Bio Visit: ktllp.cpa

Patrick G. Goetzinger
Attorney
Gunderson, Palmer, Nelson and
Ashmore, LLP
For Full Bio Visit: gpna.com



Tuesday, May 21, 2024

The Private Family Trust Company, Directed Trusts and Other Powerful Alternatives

Presented by:

Mr. Al King

Co-Chairman and Co-Chief Executive Officer, South Dakota Trust Company, LLC and SDTC Related Companies



Biography

Al W. King III is the Co-Founder, Co-Chairman and Co-Chief Executive Officer of South Dakota Trust Company LLC (SDTC) and SDTC Related Companies with offices in South Dakota, New York, Wyoming, Nevada and Westport, CT. SDTC is a national trust boutique serving wealthy families from 54 countries and 47 states. SDTC currently has more than \$140 billion in assets under administration.

Mr. King was previously Managing Director and National Director of Estate Planning for Citigroup. Mr. King was also the Co-Founder and Vice Chairman of Citicorp Trust South Dakota. Mr. King also previously served as Director of Financial and Estate Planning for Coopers and Lybrand in Stamford, Connecticut.

Mr. King is the Co-Vice Chairman of the Editorial Board of *Trusts & Estates* Magazine. He has been a member of the Editorial Board for over 30 years. Mr. King has been inducted into the National Association of Estate Planners & Councils (NAEPC) *Estate Planning Hall of Fame* as an Accredited Estate Planner (AEP), Distinguished. Mr. King previously served on the Board of Directors for NAEPC and is the Former Chairman of the NAEPC Foundation Advisory Board. He is currently a member of both the NAEPC webinar and publications committees. He is also a member of several groups and organizations including the Society of Trust and Estate Professionals (STEP), the International Association of Advisors in Philanthropy (AiP), New York Philanthropic Advisors Network (NYPAN), Fairfield County and New York City Estate Planning Councils, etc. In addition, he is frequently published and quoted by several publications on various Estate Planning topics and addresses several professional organizations, special interest groups, and general audiences on the subject of estate and trust planning.

Mr. King received a Bachelor of Arts cum laude from Holy Cross College, a Juris Doctor from Syracuse University College of Law and an LL.M. in Tax Law from Boston University School of Law. Mr. King is a resident of Westport, CT.

Tuesday, June 11, 2024

***Top 30 Best Practices
When Advising Families
with Special Needs
Beneficiaries***

Presented by:

Kristen M. Lewis, Esq.
The Atlanta office of Harrison, LLP
Atlanta, Georgia



Biography

Ms. Lewis is nationally recognized for her proficiency in Special Needs Trust planning for persons challenged by disabilities and is a frequent speaker and author on this topic. She is a Fellow of the American College of Trust and Estate Counsel (ACTEC), and an active member of the Special Needs Alliance, where she has served as Co-Editor of that organization's monthly e-newsletter, The Voice. She is also a member of the American Bar Association, the New York Bar Association Elder Law Section, and the State Bar of Georgia Fiduciary Law Section. She is a former Co-Chair of the Long-Term Care, Medicaid and Special Needs Trusts Committee of the Elder Law, Disability Planning and Bioethics Group of the Real Property, Probate and Trust Law Section of the American Bar Association. Ms. Lewis is recognized in the Chambers High Net Worth Guide, Private Wealth Law, individual attorney rankings, and is included in the roster of Georgia Super Lawyers in Estate Planning and Probate. Additionally, she is recognized by Best Lawyers in America® in Trusts and Estates.

Tuesday, July 16, 2024

***Estate Tax Exemption
Sunset***

Presented by:

Thomas C. Shaw
Attorney
Forster Boughman



Biography

Thomas Shaw practices in the areas of estate planning, estate and gift taxation, corporate and business law, probate and trust administration, and general real estate. Thom is Board Certified in Wills, Trusts and Estates Law, and he holds the highest possible Martindale-Hubbell rating of AV-Preeminent.

Thom's corporate and estate planning work led him to recognize that clients often require assistance setting up and operating their business, dealing with real estate matters, and then structuring how to hand off their businesses to management or a family member, and to sort out the personal and tax law issues related to such transactions.

Thom was admitted to the Florida Bar in 1986. From 1998 to 2005, Thom served as General Counsel to an estate and financial planning company, and assisted the attorneys for the firm's clients implement the sophisticated estate planning techniques recommended to them. He is a member of the Taxation Section and the Real Property, Probate, and Trust Law Section of the Florida Bar. Thom is the President of the Central Florida Estate Planning Council and has previously served as Secretary on its Board of Directors.

Thom received a Juris Doctor Degree, with honors, from the University of Florida College of Law in 1985. He served as an intern in the Natural Resources Policy Unit of the Governor's Office in Tallahassee, Florida, between his law school and undergraduate studies. Thom received a Bachelor of Arts Degree in History, with honors, with minors in business, chemistry, and biology from Oral Roberts University in 1982.

Thom has lectured on estate planning topics in various venues, including National Business Institute, Volusia/Flagler Medical and Dental Society, New Covenant Church in Winter Springs, Florida, First Baptist Church in Windermere, Florida, and Columbia College in Orlando, Florida.