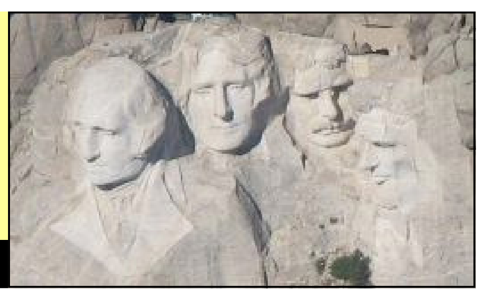
West River Estate & Financial Planning Council is an organization in western South Dakota of Financial Planners, Trust Officers, Planned Giving Professionals, Accountants, Attorneys, and Life Underwriters whose purpose is to foster intelligent cooperation and a cordial understanding among the members as to the proper relationship between the function of the members.

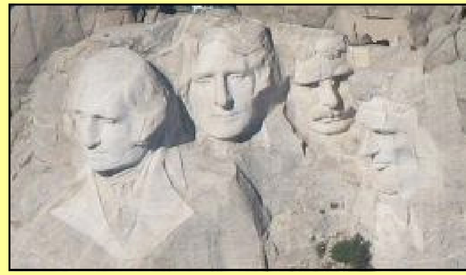
WREFPC also aims to assist its members in keeping abreast of laws and conditions affecting business and personal taxation and the problems of estate accumulation and conservation so as to improve the knowledge of each member within their sphere; and with these objectives.

WREFPC encourages its members to have as their ultimate goal, the understanding of the best professional service to the public. WREFPC is a member of the National Association of Estate Planners & Councils.

The National Association of Estate Planners & Councils (NAEPC) is a national organization of professional estate planners and affiliated Estate Planning Councils focused on establishing and monitoring the highest professional and educational standards. NAEPC fosters public awareness of the quality services rendered by professionals who meet these standards. NAEPC builds a team approach involving cross-professional disciplines to better serve the public's need in estate planning.

WREFPC
PO Box 2396
Rapid City, SD 57709
www.WREFPC.org





PO Box 2396
Rapid City, SD 57709

WEST RIVER ESTATE & FINANCIAL PLANNING COUNCIL

2011 Executive Committee

Julie Martinez-President
Mike Porter-Vice President
Becky Vogt-Secretary
Mike Dell-Treasurer
Valerie Olney
Hugh Boyle
Erika Kroetch Campbell
Dave Schmidt
Julie Martin
Michelle Minnerath
Denise Webster-Past President

www.WREFPC.org

2011 WREFPC Speakers' Schedule

All meetings will be held at the **Christensen Hall of Fame**
in the **King Center at SDSM&T,**
Parking on the south side of the building.
Lunch will be served at 11:15
so the speaker can start promptly at 11:30.

Exception: No lunch will be served at the September meeting.

May 12, 2011, 11:30 am-1:30 pm Lunch served at 11:15
Randy Moses
Healthcare Reform and How it Will Affect Your Clients

June 16, 2011, 11:30 am-1:30 pm Lunch served at 11:15
Roger McEowen
Ag related taxes, Personal Estate Planning, Succession Planning, Land Rich/Cash Poor

July 14, 2011, 11:30 am-1:30 pm Lunch served at 11:15
David English
Current Topics in Elder Law for the Estate Planner

August 18, 2011, 11:30 am-1:00 pm Lunch served at 11:15
Dan Todd, & Robert Kean
Medicaid Trusts, Transfers & Recovery

September 22, 2011, 10:00 am-12:00 pm No lunch served, Danish & coffee
Governor Dennis Daurgaard, SD Governor
South Dakota Economic Issues

October 20, 2011, 11:30 am-1:30 pm Lunch served at 11:15
John A. Warnick
Successful Launching of Children & Grandchildren and Purposeful Trusts™

WREFPC Seminar Location
Christensen Hall of Fame Room, King Center at SDSM&T
Parking on south side of King Center

New this year...
Members will receive emails directly from NAEPC giving industry updates and information. Your email address will not be used by any other organization or sold to anyone. The national website has limitless information for you to tap into. Take advantage of this membership perk.

Membership Benefits

- Personal Website listing on WREFPC.org
- Link to personal website on WREFPC.org
- Software discounts and discounts on over 175 CCH professional titles
- Educational Opportunities—local seminars and national Webinars offered through NAEPC
- NAEPC Newsletters via email
- Logo Merchandise available for Accredited Estate Planners and NAEPC logo shirts
- Subscriptions & Publications—member discounts
- Many Estate Planning resources

Guests are welcome.
Payment of $20 can be made at the door.
Members must RSVP for their guests.
A guest may attend a maximum of 2 seminars per year.
Questions, contact Julie Martinez, 342-8840 or julie@purplewealthllc.com

October 20, 2011, 11:30 am-1:30 pm Lunch served at 11:15
John A. Warnick, *Successful Launching of Children and Grandchildren and Purposeful Trusts™*

For almost eleven years **John A. Warnick** was a partner with a large law firm headquartered in the Western U.S., where he chaired that firm's Private Client Service Group. Last year Mr. Warnick left that firm to launch the Purposeful Planning Collaboration, an advisory organization which supports estate planning attorneys, financial planners, CPAs, trustees, wealth psychologists and family business consultants who want to combine cutting edge technical advice with best practices for improving a family's relational wealth. Mr. Warnick's Seven Keys of Purposeful Trusts and Six Paradigms of Purposeful Planning are revolutionizing the way estate plans are designed and implemented. These concepts ensure that the impact of the family's affluence will be a positive force in the lives of the rising generations.

Mr. Warnick is spending 50% of his professional energy practicing law and limits his practice today to what he calls Purposeful Trusts and Purposeful Drafting. He spends the other 50% of his professional life writing, speaking, and collaborating with other lawyers and planners across the country.

Mr. Warnick, whose family, friends and clients know him as "John A", emphasizes multi-generational trust and tax planning in his law practice. Mr. Warnick balances his enthusiasm for tax savings with insightful questions which insure the planning is congruent with the client's vision and values.

Additional Information & credentials:

-Fellow of the American College of Trust and Estate Counsel, officer and director of Advisors in Philanthropy, and a founding member of the Collaboration for Family Flourishing.

-Assisted numerous families in choosing the most favorable trust situs for the tax and nontax objectives of existing trusts as well as in designing and drafting new trusts which have the flexibility to adapt to changing legal and tax climates

-Founder of Philanthropy U – a teleconference series featuring leading philanthropists, philanthropist advisors and innovators from the philanthropic sector

-Initiator of the *Seedlings* blog which offers suggestions for how parents and grandparents can increase their generative influence and make their testamentary and lifetime gifts more purposeful and positive.

-Founding Collaborator of the Purposeful Next Gen Collaboration, a monthly call based on case studies presented by advisors, planners, attorneys, and consultants who have been practicing less than 15 years and who spend a significant portion of their professional service with next generation family members.

-Worked with a team of nationally recognized family wealth coaches and psychologists to explore the intersection of wealth and emerging adulthood

-Has spoken extensively across the nation to both professional audiences and client events

-Author of two Bureau of National Affairs Tax Management portfolios and co-authored "Selecting a Trust Situs in the 21st Century" which was published in the March/April 2002 issue of Probate and Property

-Working currently on two books entitled *The Seven Keys of Purposeful Trusts – How to Make Your Family Wealth a Powerfully Positive Legacy* and *The New Vocabulary of Family Wealth*

-B.A. degree, Magna Cum Laude, Brigham Young University

-J.D. degree, with honors, George Washington University

May 12, 2011, 11:30 am-1:30 pm Lunch served at 11:15 am
Randy Moses
Healthcare Reform and How it will Affect Your Clients

Randy Moses currently serves as Assistant Director with the SD Division of Insurance where he has held several positions since 1983. He is responsible for oversight of property/casualty and life/health insurance. As the primary lobbyist for the Division, Randy oversees legislative and rulemaking functions. Prior to joining the SD Division of Insurance in 1983, he had six prior years of investigative experience in Human Relations with another State agency.

Randy has a Bachelor of Science degree from South Dakota State University with majors in Sociology and Psychology. He is a Fellow Life Management Institute member. Randy has served as a member or chairman on numerous task forces and working groups at the National Association of Insurance Commissioners developing model laws and regulations. Currently Randy serves on the:

Regulartory Framework Task Force (Vice Chair)
ERISA Working Group
Senior Issues
Long Term Care Task Force
Surplus Lines Task Force
Crop Insurance Working Group

June 16, 2011, 11:30 am-1:30 pm Lunch served at 11:15 am
Roger McEowen
Ag Related Tax Issues, Land Rich/Tax Poor

Roger A. McEowen is the Leonard Dolezal Professor in Agricultural Law at Iowa State University in Ames, Iowa, where he is also the Director of the ISU Center for Agricultural Law and Taxation. Before joining Iowa State in 2004, he was an associate professor of agricultural law and extension specialist in agricultural law and policy at Kansas State. From 1991-1993, he was in the full-time practice of law with Kelley, Scritsmier and Byrne.

At Iowa State, Professor McEowen develops and conducts an educational program in agricultural law and policy and is responsible for developing the curriculum and instructional program for the Iowa Farm Income Tax Schools.

Professor McEowen has published scholarly articles in the Journal of Agricultural Taxation and Law, Indiana Law Review, Drake Journal of Agricultural Law, North Dakota Law Review, Nebraska Law Review, the Monthly Digest of Tax Articles, Tax Notes, West's Social Security Reporting System, Toledo Law Review, Washburn Law Review, Creighton Law Review, Agricultural Law Update, and the Agricultural Law Digest. He is also the lead author of a 1,300-page textbook/casebook on agricultural law. He also authors the monthly publication, "Kansas Farm and Estate Law." In addition, Professor McEowen is the co-author of Bureau of National Affairs (BNA) Tax Management Portfolios on the federal estate tax family-owned business deduction and the reporting of farm income, and is the lead author of a BNA portfolio concerning the income taxation of cooperatives.

July 14, 2011, 11:30 am-1:30 pm Lunch served at 11:15 am
David M. English
Current Topics in Elder Law for the Estate Planner

David M. English is the W.F.Fratcher Missouri Professor of Law at the University of Missouri. Professor English is best known for his work with the Uniform Law Commission, for whom he was the Reporter (principal drafter) for the Uniform Trust Code, the Uniform Health-Care Decisions Act, and the Uniform Adult Guardianship and Protective Proceedings Jurisdiction Act. For the American Bar Association, Professor English is currently a member of its House of Delegates, a member of its Commission on Law and Aging, and a member of the Executive Committee of the Section of Real Property Trust & Estate Law.

Professor English is co-author of the treatises *Tax, Estate and Financial Planning for the Elderly*, and *Tax, Estate and Financial Planning for the Elderly: Forms and Practice*, published by Matthew Bender & Co., co-author of *Fiduciary Accounting and Trust Administration Guide*, published by ALI-ABA; and co-author of *Wills, Trusts & Estates*, published by West Publishing Company.

Professor English received his B.A. in Economics from Duke University and his J.D. from Northwestern University School of Law. Prior to joining the faculty of the University of Missouri in 1998, Professor English taught at the Universities of South Dakota and Santa Clara and practiced law in Chicago. During 2004, he was a Fulbright Visiting Professor of Law at the University of Tokyo.

NEW CFP OPTION

Financial Planners registered with Certified Financial Planner Board of Standards have the option this year to pay an additional $25 with their dues to have WREFPC report their continuing education hours.
Your assigned CFP membership number is required.
(Continuing education hours are not guaranteed. Subject to approval.)

August 18, 2011, 11:30 am-1:30 pm Lunch served at 11:15
Dan Todd & Robert Kean
Medicaid Trusts, Transfers & Recovery

Daniel J. Todd is currently a Special Assistant Attorney General and Director of the Division of Legal Services of the South Dakota Department of Social Services. His main duties include acting as counsel for and overseeing all legal services needed by the Department and the various divisions within the Department including services to Child Protection Services, Child Care Services, Child Support, Economic Assistance, Medical Services, Adult Services and Aging, and the Office of Recoveries and Fraud Investigations. Prior to being appointed as Special Assistant Attorney General, Dan was the States Attorney in Walworth County for 19 years and carried on a general practice of law with emphasis on Wills, Probate, Estate Planning and Real Estate transactions. Dan obtained his JD from USD Law School in 1985.

August 18, 2011, 11:30 am-1:30 pm cont.

Robert Kean, Executive Director of South Dakota Advocacy Services (SDAS). SDAS, a not for profit corporation, is the state designated protection and advocacy system providing an array of assistive and legal services statewide to individuals and their families whose concerns are related to disability issues. Kean directs a staff of 22 located in Rapid City, Yankton, Sioux Falls and Pierre. He maintains an active caseload representative of clients served by SDAS, regularly publishes in the agency newsletter, assists in the development and conduct of disability related trainings and peer professional meetings and trainings at the state, regional and national level.

Kean participated in South Dakota Code/Administrative Rules revisions writing committees including: SDCL Title 27A, Mentally Ill Persons; SDCL Title 27B, Developmentally Disabled Persons; SDCL Title 29A, Chapter 5, South Dakota Guardianship and Conservatorship Act. He participated in the development of the initial Hamilton Trust.

Kean has experience in legislative advocacy on public interest disability issues including special education, services, scope and applicability of state disability related laws and regulations, guardianship/conservatorship, advance directives, assistive technology, lemon law, mental health, metabolic screening, and parity insurance.

Kean is a member of the local, state and federal bar. He participates in disability related committees/workgroups including the State Governor's Council on Developmental Disabilities, Mental Health Advisory Council, Behavioral Health Services Workgroup. Member, US Dept. of Health and Human Services, Center for Mental Health Services, State Mental Health Plan Review Team.

Sept. 22, 2011, 10:00 am-12:00 pm NO LUNCH SERVED
South Dakota Governor Dennis Daugaard
South Dakota Economic Issues

Due to limited space, this seminar is limited to members and one guest only.
Payment of guest must be made prior to September 20th.
Space limited to first 90 paid reservations!

South Dakota Governor **Dennis Daugaard** became Executive Director of Children's Home Society of South Dakota in 2002. Dennis left Children's Home Society on October 31, 2009 to focus full-time on his campaign for governor.

Dennis became involved in politics in 1996. His legislative record was particularly focused on protecting children, helping the disabled, and getting tough on crime.

In June 2002, Mike Rounds selected Dennis to be his running mate as the Republican nominee for lieutenant governor. The Rounds/Daugaard team was elected in 2002 and reelected in 2006. As lieutenant governor, Dennis served as President of the Senate, directing the debate when the Senate convenes each day during the legislative session. Dennis also assists the Governor in pursuing his legislative agenda, and assumes other duties as he may direct. Dennis chaired the Worker's Compensation Advisory Board and the Zaniya Health Care task force, and also served on the Constitutional Revision Commission. He was instrumental in the creation of the SD Ellsworth Development Authority, and has been a leader of the SD Honor Flight program.

Dennis successfully sought the Republican nomination for governor in June 2010, winning 50 percent in a five-person field. He and his running mate, former house speaker Matt Michels of Yankton, were elected in November 2010 with 62 percent of the vote. He was sworn in as Governor on January 8, 2011.