West River Estate & Financial Planning Council

2022 Season

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

2022 Registration Details

An email registration will be sent to members prior to each event.
All members must RSVP for each speaker.
You'll be asked if you'll be attending in-person or via Zoom.

In-Person Attendance Details: *The Journey Museum: Wells Fargo Theater* (222 New York St., Rapid City), 11:30 am - 1:00 pm

Please arrive at 11:15 am to find a seat. **We're bringing back lunch!** Lunch will be ordered for those that RSVP to attend in-person. If you're not feeling well the day of the event we ask that you attend the meeting via Zoom.

Zoom Attendance Details: Those that RSVP to attend via Zoom will be sent the Zoom log-in details prior to the event.

2022 Executive Committee

President: Lisa Cagle, Gunderson, Palmer, Nelson, Ashmore LLP
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Past President: Jeff Partridge, Partridge Financial

Guest Attendance

Guests are welcome to attend with a member.
A cash or check payment of $20 per guest must be paid at the door.
Your guest will receive lunch if attending in-person.
Members must RSVP for their guests.
A guest may attend a maximum of 2 seminars per year.

May 19, 2022

11:30 am - 1:00 pm

Pandora Papers: *The Rest of the Story*

Presented by:

Terry N. Prendergast

Attorney, Davenport, Evans, Hurwitz & Smith, L.L.P.

Biography

Terry Prendergast is a trusts and estates and trust company attorney at Davenport Evans. Terry joined the firm in 2017 with a prestigious career of nearly 40 years practicing law in Sioux Falls. Interacting with counsel and clients across the country and the world, Terry extols the virtues of South Dakota's top-in-the-nation trust laws, flexible procedures and low tax environment, stating, "To open up people's eyes to one of the best kept secrets in business—that South Dakota has a flexible, advantageous and responsive environment for business, estate and wealth planning, gives me great satisfaction."

Terry's professional background:

- Provided legal counsel to hundreds of trust clients with trusts containing assets from a few thousand dollars to over $5 billion.
- Worked with trust company clients with over $180 billion of assets under management in South Dakota.
- Worked on transactions ranging from $5,000 to $300 million dollars.
- Served as special counsel for multiple institutes of higher education in South Dakota, and as hearing examiner for the South Dakota Board of Regents.
- Served as special counsel for the formation of three public captive insurance companies for the State of South Dakota, its agencies, and various authorities for the State of South Dakota.
- Served on Governor's Task Force on Trust Administration Review and Reform, 2010-2018.

As a die-hard sports fan, Terry helped in the start of the Northern League (the first independent professional baseball league) in 1992. He was a co-owner of the Sioux Falls Canaries independent minor league baseball team with Mike Veeck from 1998-2009.

Terry has received an AV Preeminent® Peer Review Rating by Martindale-Hubbell®, for the highest level of professional excellence for his legal knowledge, communication skills and ethical standards. He has been selected to Best Lawyers® in the area of Trusts and Estates, and has also been ranked in the top 5% of practicing attorneys in South Dakota by Great Plains Super Lawyers in the areas of Estate Planning & Probate. Terry has a Band 1 individual ranking in the Chambers High Net Worth Guide in the area of Private Wealth law, and was ranked by Chambers and Partners in the area of Corporate/Commercial law.

June 16, 2022

11:30 am - 1:00 pm

Corporate Transparency Act

Transparency for the Feds: *Overview and Application*

Presented by:

Tom Geu

Dean and Professor Emeritus,
University of South Dakota,

Biography

Tom Geu is Dean and Professor Emeritus at the University of South Dakota Knudson School of Law. He currently teaches business and courses related to fiduciary relationships as a senior lecturer/visiting professor there.

He is active in the Uniform Law Commission (and served as the national reporter for the Uniform Limited Cooperative Association Act) and the Business sections of the American and South Dakota State Bars and the American College of LLC and Unincorporated Attorneys. Tom was also co-chair of the Joint Division LLC Committee for the Real Property, Trust and Estate Section of the ABA for approximately seven years.

Before becoming an academic lawyer he practiced law with a firm in Lincoln, Nebraska, and worked for judges on the United States Tax Court (Washington, DC) and the Seventh Circuit Federal Court of Appeals (Chicago, IL).

Tom grew up on a farm and ranch in the Nebraska Panhandle but has now lived in South Dakota for 34 years.

July 21, 2022

11:30 am - 1:00 pm

Preparing for the Long-term Care Conversation

Co-Presented by:

Bre Pham & Chance Helmick

Pacific Life

Biographies

Breanna Pham, fondly known as Bre, is the LTC Wholesaler covering Minnesota, North Dakota and South Dakota. Bre specializes in partnering with Financial Professionals to help protect clients and their loved ones from the emotional and financial burden of long-term care.

She brings over 11 years of experience in the financial services industry with the most recent 4 years on the long term care team at Pacific Life. Bre is also an inaugural member of the Association of Wholesaling Diversity. Prior to joining Pacific Life, she lived in Henderson, NV, and worked with an FMO specializing in fixed index annuities.

Bre was born and raised in Wichita, KS. After spending 5 years in Henderson, she along with her two children and husband now reside in Omaha, NE, and enjoy all 4 seasons.

Education, Licenses, Certifications, Training: FINRA 6 & 63 (securities distributed by Pacific Select Distributors, LLC, member FINRA and SIPC), Life & Health Insurance Licensed

Chance Helmick is a Retirement Solutions Wholesaler for Pacific Life. Chance travels throughout Montana, North Dakota, South Dakota, Wyoming, and Alaska, working with financial professionals. Chance prides himself on using a proactive, consultative approach to wholesaling.

Chance's Bio continued on next page.

Chance Helmick Bio continued

Chance's knowledge of the multiple product solutions Pacific Life offers, including fixed and variable annuities, mutual funds, and long-term care, can help financial professionals expand their practice. Chance is a trusted resource with sales ideas, shares best practices, and delivers compelling seminar presentations.

Chance is a Nebraska native but plans on relocating to the Montana, Bozeman area. Chance was a multiple-time state champion wrestler and wrestled collegiately for St. Cloud State. He is an avid sports fan and enjoys traveling, fitness, hiking, fishing, golf, and most importantly, spending time with his fiancé Delaney and their 2 animals, Fleur and Al.

Education and specialized training: Bachelor of Science in Finance, St. Cloud State University; Series 6, 7, 63, Life, Health, and Variable Products; Chartered Retirement Planning Counselor (CRPC®)

August 18, 2022

11:30 am - 1:00 pm

Navigating the Current Charitable Planning Landscape: *Tips for Professional Advisors*

Presented by:

Ginger F. Mlakar, Esq.

Biography

As General Counsel, Ginger Mlakar serves as in-house legal counsel and oversees the Cleveland Foundation's gift planning team. She came to the Cleveland Foundation in July 2009 after 16 years practicing law in the area of estate and charitable gift planning and administration. Ginger is a frequent speaker on legal and tax issues surrounding charitable giving. Ginger has been named among the Best Lawyers in America and the Top 50 Female Ohio Super Lawyers List by Law and Politics magazine. She graduated summa cum laude from The Ohio State University with a Bachelor of Science degree in business administration and earned her juris doctorate from The Ohio State University Moritz College of Law.

September 22, 2022

11:30 am - 1:00 pm

The Core of Crypto

Presented by:

Kyle Pickner

Chief Trust Officer,

Plains Commerce Bank

Biography

Kyle Pickner joined Plains Commerce Bank as Chief Trust Officer in early 2021. Kyle began working in the trust industry in 2013 and gained a wealth of experience working with various organizations in roles such as Trust Officer, Chief Compliance Officer, and Director of Trust Operations. In 2018, Kyle began consulting and advising trust companies on compliance, operations, and administrative matters.

Kyle most recently led the financial operations for one of the world's largest digital asset custodians, taking them from a start-up to a multi-billion-dollar institution. Thriving on a challenge, Kyle was tasked with the idea of combining Silicon Valley tech and Wall Street finance. He was instrumental in their success, helping build their financial operations and compliance program from the ground up.

Kyle's role touched nearly every aspect of business from security to product management engineering to legal and compliance.

Kyle's goal at Plains Commerce Bank is to bridge the gap between traditional finance and cryptocurrency. He understands that conventional banking is changing right before our eyes. Consumers, along with businesses, are looking to the established banking system for assurance that their hard-earned assets are protected from the full range of risks.

With his extensive expertise in blockchain technology and digital assets, Kyle will lead the Plains Commerce team in bringing to market industry-first digital asset solutions to be offered for the first time through the traditional banking environment. Kyle aims to instill a mainstream public confidence in cryptocurrency and to ultimately help usher in a new era of innovation and efficiency for the bank. Kyle's clear vision will take Plains Commerce into the future as they pave their way into the age of digitization.

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See an Executive Council Member or the Executive Secretary for details.

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