

West River Estate & Financial Planning Council

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

2023 Registration Details

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

All members must RSVP for each speaker.

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

Time: 11:30 am - 1:00 pm

2023 Executive Committee

President: Beth Massa, South Dakota Community Foundation

Vice President: Allison Creelman, South Dakota Trust Company LLC

Treasurer: Cara Boland, Casey Peterson, LTD

Secretary: Reece Weber, Costello Porter

Additional Board Members:

Andy Bartling, Modern Woodmen of America

Edward Bartling, Financial Markets Inc.

Kyle Bargmann, Edward Jones

Mary Hlebechuk, Ketel Thorstenson, LLP

Owen Wiese, Gunderson, Palmer, Nelson & Ashmore, LLP

Tammy Flores, First Interstate Wealth Management

Past President: Lisa Cagle, Gunderson, Palmer, Nelson & Ashmore LLP

Guest Attendance

Guests are welcome to attend with a member.

A cash or check payment of \$30 per guest must be paid at the door.

Members must RSVP for their guests.

A guest may attend a maximum of 2 seminars per year.

May 18, 2023

11:30 am - 1:00 pm

High Performance Teaming & Professional Collaboration

Presented by:

Susan P. Rounds,

**Director, Head of U.S. Wealth Planning
Deutsche Bank Wealth Management**



Biography

Ms. Rounds specializes in providing services and solutions to clients in the areas of tax and estate planning, business succession, risk management, philanthropy, family governance, intergenerational wealth transfer, and legacy planning. In a career spanning over 25 years, Ms. Rounds has advised ultra-high-net-worth individuals, families, and privately-held business owner clients during her tenure in Big Eight Accounting, global financial institutions, and private legal practice. Ms. Rounds was inducted into the NAEPC Estate Planning Hall of Fame® Class of '22.

As a national speaker, author, and commentator, her articles have been featured in leading publications such as Trusts & Estates Magazine, The Journal of Practical Estate Planning, and The Journal of Private Wealth Management. Ms. Rounds makes frequent presentations at national seminars and Estate Planning Councils across the country.

Ms. Rounds sits on the Editorial Board for Opportunity Zone Magazine and has been named as one of the Top 25 Opportunity Zone Influencers in the country for the past 5 years. Ms. Rounds previously served as a member of the board of directors for the National Association of Estate Planners and Councils, and as Editor for the NAEPC Journal of Estate and Tax Planning.

Ms. Rounds taught Federal Estate and Gift Tax at the University of Georgia School of Law, Federal Income Tax and Principles of Accounting at the University of Georgia Terry College of Business, and all sections for the National CPA Examination, including Financial Reporting; Income Tax and Regulatory Reporting; Business Law; and Audit. She also served as a faculty member for the NYU Summer Institute on Taxation.

Formal degrees and designations include a BBA in Accounting, cum laude, from UT El Paso, a Juris Doctor from the University of Georgia, and an LL.M. in Taxation from Emory University School of Law. Ms. Rounds passed the comprehensive four-part CPA exam on the first sitting and is a registered TEP (Trusts and Estates Practitioner) and earned the STEP Advanced Certificate in Cross-Border Estate Planning. Ms. Rounds is also an Accredited Estate Planner® (Distinguished).

June 15, 2023

11:30 am - 1:00 pm

Secure 2.0 and the Legacy IRA

Presented by:

Russell A. Willis III

**Manager, Non-Cash Research
Charitable Solutions, LLC**



Biography

Russell A. Willis III, J.D., LL.M., is a consultant to licensed professionals -- an advisor to the advisor -- on issues arising in connection with wealth transfers. Much of his practice is focused on structuring charitable contributions of closely held business and real property interests.

Among his other engagements, Russ is a manager of noncash research for Charitable Solutions, LLC, a planned gift risk management consulting firm headed by Bryan Clontz. About five years ago, he launched a newsletter, the Jack Straw Fortnightly, analyzing current developments in the law -- both tax and nontax -- concerning the transfer of private wealth in this country.

Russ has a law degree from St. Louis University and a master's degree in Taxation Law from Washington University in St. Louis. His undergraduate degree in English Literature is from Indiana University, Bloomington, and he has a master's degree in English from the University of Chicago.

A transportation bicyclist and sometime bike mechanic, Russ has lived (almost) car-free since 2008.

July 20, 2023

11:30 am - 1:00 pm

*Changing Children into
Cheerleaders who Champion
Chivalry*

Presented by:

Professor Tom Simmons
University of South Dakota School
of Law



Biography

Tom Simmons is a professor at the University of South Dakota Knudson School of Law where he teaches Trusts & Wills, Estate Planning, Professional Responsibility, Remedies, and a pair of Tribal Wills Clinic courses.

Tom is an academic fellow and current state chair of the American College of Trust and Estate Counsel, a fellow of the American College of Tax Counsel, and a life fellow and state chair of the American Bar Foundation. He received the Cutler Award for Excellence in Legal Education in 2016 and the John Wesley Jackson Memorial Award for Outstanding Professor of Law in 2018 and 2020.

He serves on the South Dakota Governor's Task Force on Trust Administration Review and Reform. He serves as an Associate Justice on the Rosebud Sioux Tribe Supreme Court. He also a member of the South Dakota Advisory Council to the U.S. Commission on Civil Rights and the Clay County Planning and Zoning Board.

Prior to joining the academy, Tom clerked for district court judge Andrew Bogue and was a partner with the Gunderson, Palmer, Nelson & Ashmore law firm.

He has taught at every educational level: Head Start, junior high students in Japan, fourth graders in the U.S., paralegal students, and law students.

But for four years in Canada, a year in Japan, and five in Nebraska, he is a lifelong South Dakotan.

August 17, 2023

11:30 am - 1:00 pm

Social Security

Presented by:

Connor Jackson
International Business Consultant
John Hancock Investment Management



Biography

Connor Jackson is a seasoned financial professional with over 7 years of experience as a financial advisor. After graduating from the University of Arizona in 2015 with a degree in Finance, Connor started his career at Merrill where he quickly climbed the ranks, thanks to his expertise and dedication to helping clients achieve their financial goals. During his time at Merrill Lynch, Connor gained extensive experience in investment management, retirement planning, estate planning, and risk management, among other areas of wealth management. His ability to develop tailored financial plans and build strong relationships with clients earned him numerous accolades and recognition within the firm.

In 2022, Connor joined John Hancock as a consultant for financial advisors, where he leverages his extensive knowledge to help advisors build and grow their businesses. In his current role, Connor works closely with advisors to develop effective business strategies, implement best practices, and optimize operational efficiency. Connor is a highly motivated, results-oriented individual with a passion for helping clients achieve their financial goals.

September 21, 2023

11:30 am - 1:00 pm

Asset Protection + Preserving a Legacy via Legacy Advantage

Presented by:

Vicente Pina

**Director, Advance Planning,
Retirement and Life Distribution
Prudential Financial, Inc.**



Biography

Vicente Pina has more than 25 years in Advanced Planning and Advanced Marketing. He serves as a Director on Prudential's Individual Life Insurance Advanced Planning team. Vicente brings over 30 years of experience in the financial services industry to the team, and has worked predominately in the development, marketing, distribution, and support of life insurance. Vicente's primary focus at Prudential is Life Insurance Planning for the Ultra Affluent, Strategies for High-Net-Worth and Foreign National Clients, and Advanced Case Design. He has spoken at events throughout the United States and Internationally.

- Prior to joining Prudential, Vicente was Director of Member Firm Development for M Financial Group.
- He previously worked in New York City for TIAA-CREF and AXA, where he was responsible for life insurance marketing, product development, and support.
- Vicente formerly worked for LIMRA, where he was Director of Latin America and Director of Development for Asia/Pacific.
- He started his career with Prudential in 1989 as a Financial Advisor & Registered Representative.
- Vicente is a Magna Cum Laude graduate of George Washington University, where he received a master's degree in business administration (MBA), and holds a Certificate in Management/Leadership. He received a bachelor's degree in business administration from Bryant University with a concentration in Marketing.
- He is a Fellow, LIMRA Life Institute/Babson College Executive Development and holds the Chartered Financial Consultant and Chartered Life Underwriter designations from The American College of Financial Services.
- Vicente is an Accredited Estate Planner by the National Association of Estate Planning Councils and a Fellow of the Life Management Institute, issued by the Life Office Management Association (LOMA).
- 2016-2022: Speaker, Spokane Estate Planning Council Annual Meeting at the Gonzaga University School of Law; Speaker, Northwest Estate Planning Council, Bellingham, WA; M Financial Group International Meeting, Miami, FL; Wells Fargo, Milwaukee, WI; Prudential Advisors, Bellevue, WA; Prudential Institutional West Coast Region meeting, Las Vegas, NV; Edward Jones, Bellevue, WA; Edward Jones, Sacramento, CA; Innovative Solutions, Phoenix, AZ; Estate Planning Council of San Bernardino County, CA.

Vicente and his family reside in the Portland, Oregon area. He is FINRA Series 6, 7, 26, 63 and 66 licensed.

Specialties: Estate Planning, Wealth Transfer, Planning for High Net Worth & Ultra Affluent, Foreign National Planning, Business Succession/Continuation, Advanced Case Design.

**A BIG Thank You to last year's
2022 WREFPC Sponsors**

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Skyline Wealth Management Advisors

South Dakota Community Foundation

South Dakota Trust Company LLC

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

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