

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

2021 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: *New location & Time: The Wells Fargo Theater at The Journey Museum (222 New York St.), 11:30 am - 12:30 pm*

Please arrive at **11:15am** to be escorted to your seat. If preferred, those attending from the same company will be permitted to sit together. To maintain social distancing, a 2 seat separation between groups/individuals will be maintained. Masks will be required for the audience during the event. If you are not feeling well the day of the event we ask that you attend the meeting via Zoom. There will be a maximum allowance of 52 attendees in the Theater.

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

2021 Executive Committee

President: Jeff Partridge, Partridge Financial

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Michael Steve, Costello Porter

Vance Newman, CFP, Boulder Creek Wealth Advisors

Past President: Andrew G. Buks

COVID-19 Disclaimer:

The board is monitoring our area for COVID-19, if needed we'll move our events to an all Zoom format. To find the most up-to-date information on any changes or cancellations please visit wrefpc.org. Also, keep an eye out for emails from WREFPC. Be sure to add wrefpc@gmail.com to your email safe senders list.

September 16, 2021

11:30 am - 12:30 pm

Corporate Transparency Act: A new law for you and your clients requiring all businesses to file “Beneficial Ownership” information with FinCEN.

Presented by:

Mark Spitz

Owner, Spritz Legal Counsel LLC



Biography

Mark Spitz is the owner of Spitz Legal Counsel LLC in Denver. His practice focuses on corporate and business law serving entrepreneurs, startups, and small-to-mid-sized businesses. He assists clients with contracts and other transactions, employment law matters, acquisitions, forming new companies, and advising clients on legal issues and how those issues fit into overall business strategies. Mark also serves as outside general counsel to several clients.

Mark began his legal career in a large law firm and went on to serve as in-house counsel with several companies, including as general counsel of an IT services company, all in the Cincinnati, Ohio area.

Mark moved to Colorado in 2010 when his wife accepted a position at the University of Denver. He has taught as an adjunct instructor at the Metropolitan State University of Denver and the University of Denver’s Daniels College of Business and Sturm College of Law. He has done pro bono work with the Colorado Lawyers’ Committee and the Rocky Mountain Immigration Advocacy Network. Mark also currently serves on the board of the nonprofit Education Through Music-Colorado, which brings music teachers and programs into Denver area public schools that lack such resources.

Mark has a law degree from Boston College Law School, a master’s in international affairs from Columbia University, and a bachelor’s degree from Harvard University.

May 20, 2021

11:30 am - 12:30 pm

Charitable Giving: Tiering Family & Philanthropic Goals in Estate Planning

Presented by:

Marc Littlecott, CAP, CGPP

Director of Gift Planning, SDSU Foundation

Biography

Marc Littlecott is the Director of Gift Planning at the South Dakota State University Foundation in Brookings SD. He is a Chartered Advisor in Philanthropy® and a Certified Gift Planning Professional. He has worked in the field of non-profit development for over two decades, working for the Boy Scouts of America, The Salvation Army, and since 2014, the SDSU Foundation. His two-person team primarily coordinates planning for gifts to the university via estates, business interests, and real property.

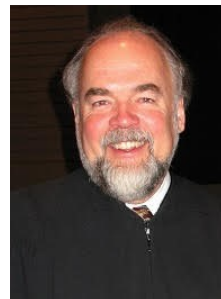
In addition to his role with the SDSU Foundation, Marc is on the editorial board of the planned giving field’s leading trade-journal, *Planned Giving Today*. Prior to his nonprofit work, he served as a US Army officer after graduating from the Virginia Military Institute.

June 17, 2021

11:30 am - 12:30 pm

Elder Abuse: Learn the signs, know the tools & help protect your clients and families.

Co-Presented by:



**Chief Justice
Gilbertson,
Former Chief
Justice of the
SD Supreme
Court**



**Benjamin
Orzeske
Chief Counsel,
Uniform Law
Commission**

June 17, 2021 - Continued

Elder Abuse: Learn the signs, know the tools & help protect your clients and families.

Chief Justice Gilbertson

Biography

Chief Justice Gilbertson was elected to a 4-year term as Chief Justice by the members of the Supreme Court in September 2001, was re-elected to a second 4-year term as Chief Justice by the members of the Supreme Court in June 2005, a third 4-year term in June 2009, a fourth 4-year term in June 2013 and a fifth 4-year term in 2017. He was appointed to the Supreme Court in April 1995 to represent the Fifth Supreme Court District, which includes Brown, Butte, Campbell, Clark, Codington, Corson, Day, Deuel, Dewey, Edmunds, Faulk, Grant, Hamlin, Harding, Marshall, McPherson, Perkins, Potter, Roberts, Spink, Walworth and Ziebach counties, and was retained by the voters in the 1998, 2006 and 2014 general elections.

Chief Justice Gilbertson received his undergraduate degree from South Dakota State University in 1972 and his Juris Doctor from the University of South Dakota, School of Law in 1975. He engaged in private practice from 1975 until his appointment to the circuit court bench in 1986. He served as a Circuit Judge for the Fifth Judicial Circuit from 1986 until his appointment to the Supreme Court in 1995.

He served as President of the Conference of Chief Justices for the 2015-2016 Term. He has previously held the positions of Board Member, First-Vice President and President-elect and has chaired various committees. He also served as Chairman of the Board of Directors for the National Center for State Courts for its 2015-2016 Term. From 2010 to 2016 he served as the state court representative of the Criminal Rules Committee of the United States Courts. In 2006 he was the recipient of the Distinguished Service Award from the National Center for State Courts for his defense of judicial independence. He was the recipient of the "Grass Roots" Award by the American Bar Association in 2014 also for his defense of judicial independence. He is the past President of the South Dakota Judges Association. He also serves on the Judicial-Bar Liaison Committee of the State Bar Association and has served as a Court Counselor at South Dakota Boys State since 1995. Chief Justice Gilbertson and his wife Deb, have four children.

Benjamin Orzeske

Biography

Benjamin Orzeske is Chief Counsel at the Uniform Law Commission. He supervises a staff of legislative attorneys who work to enact uniform laws in all fifty United States, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands. Ben personally provides legislative support for uniform laws in the areas of real property, trusts and estates, investment management, and elder law. He also serves as the ULC's internal Legal Counsel.

The ULC is a non-profit law reform organization comprised of volunteer attorney/commissioners appointed by the states and supported by the staff at its Chicago headquarters. Founded in 1892, the ULC drafts model legislation in areas of state statutory law for which uniformity is feasible and appropriate.

Ben is a member of the American Bar Association Section of Real Property, Trust and Estate Law where he serves as Chair of the Legal Education and Uniform Laws Group, and also a member of the ABA Business Law Section. He is a former Chair of the Chicago Bar Association's Legislative Committee, and a member of the Illinois State Bar Association. He also serves as the ULC's staff liaison to the Joint Editorial Boards for Uniform Real Property Acts and Uniform Trust and Estate Acts.

July 15, 2021

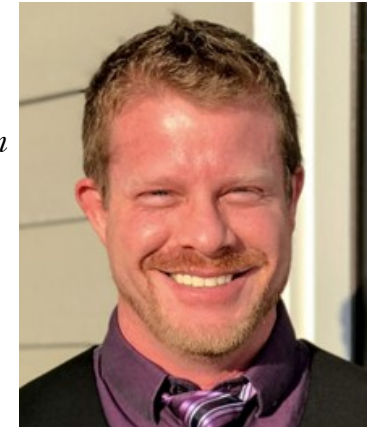
11:30 am - 12:30 pm

Cyber Security & Cyber Assets: Trends in protecting you and your clients when managing today's most dynamic cyber assets.

Presented by:

Buzz Hillestad

**SVP Information Security Consultant,
DFIR Lead, SBS Institute Instructor, GCFE**



Biography

Buzz Hillestad is a SVP Information Security Consultant and heads the Incident Response team at SBS CyberSecurity in Madison, South Dakota. SBS is a premier cybersecurity consulting and audit firm dedicated to making a positive impact on the banking and financial services industry. Hillestad has a bachelor's degree in Computer Information Systems for Business and has performed masters work in Information Security at the SANS Institute – an internationally recognized best source for cybersecurity education. Hillestad has been involved with Information Security practice in Healthcare, Banking, Government, and many other industry verticals and IT since 1996 and has helped over 200 organizations improve their information security processes and programs. Hillestad additionally has numerous security publications in magazines such as 45 Magazine and MED Midwest Medical, and speaks nationally on various cybersecurity topics.

August 19, 2021

11:30 am - 12:30 pm

Asset Rich, Cash Poor & Estate Settlement Alternatives using Life Insurance: How to help your clients understand, manage, and leverage key resources that comprise wealth.

Presented by:

Roger McEowen

**Professor of Agricultural Law and Taxation
Washburn University School of Law**

Biography

Roger A. McEowen is the Professor of Agricultural Law and Taxation at Washburn University School of Law in Topeka, Kansas.

Through 2015, he was the Leonard Dolezal Professor in Agricultural Law at Iowa State University in Ames, Iowa, where he was also the Director of the ISU Center for Agricultural Law and Taxation (CALT), which he founded. 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, McEowen was in the full-time practice of law with Kelley, Scritsmier and Byrne in North Platte, Nebraska.

He 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*, *Monthly Digest of Tax Articles*, *Tax Notes*, West's Social Security Reporting System, *Toledo Law Review*, *Washburn Law Journal*, *Creighton Law Review*, *Agricultural Law Update*, and the *Agricultural Law Digest*. He is the author of *Principles of Agricultural Law*. His *Agricultural Law and Taxation Blog*, part of the Law Professor Blogs Network, contains approximately 130 detailed and fully annotated articles annually and is the most widely read agricultural law and taxation blog online.

Prof. McEowen conducts approximately 80-100 seminars annually across the US for farmers, agricultural business professionals, lawyers, and other tax professionals. He also conducts two radio programs each airing twice monthly heard across the Midwest and on the worldwide web. He also can be seen as a weekly guest on RFD-TV where he discusses various agricultural law and tax topics with the RFD-TV hosts.

In 2003, McEowen was named the recipient of the American Agricultural Law Association (AALA) Distinguished Service Award, becoming the youngest recipient in AALA history. He is also the recipient of the AALA's award of excellence for professional scholarship. In 2006, McEowen was named the President-Elect of the AALA.

He received a B.S. with distinction from Purdue University in Management in 1986, an M.S. in Agricultural Economics from Iowa State University in 1990, and a J.D. from the Drake University School of Law in 1991. He is a member of the Iowa and Kansas Bar Associations and is admitted to practice in Nebraska.



**A BIG Thank You to last year's
2020 WREFPC Sponsors**

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South Dakota Community Foundation

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Interested in sponsorship?

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

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