

PARK NATIONAL BANK PRESENTS

Estate Planning and Ethics Seminar

Wednesday, November 9, 2022

8:15 a.m. - 4:15 p.m.

Location: Mount Vernon Nazarene University, The Gathering Place: 425 S. Edgewood Road, Mount Vernon

Cost: \$100 (includes the seminar, refreshments, and lunch)

Cancellations received before 5:00 p.m., Tuesday, November 8 will be refunded less a \$25 administrative fee.

Seating is limited. No walk-ins, please.

8:15 a.m.	Registration, Announcements, Welcome
8:30 - 9:30 a.m.	Stretching to Realize Philanthropic Goals IRAs, CRTs and the SECURE Act Brandon Borgmann, Esq.
9:30 - 10:30 a.m.	How the Estate Planner can avoid Probate Litigation Jessica Forrest, Esq.
10:30 - 10:45 a.m.	Break
10:45 - 11:45 a.m.	Legacy Trust Act Update Brian Layman, Esq., CPA, M - Tax
11:45 a.m. - 12:15 p.m.	Ethics and Professionalism Update Alvin Mathews, Esq.
12:15 - 1:00 p.m.	Lunch
1:00 - 2:00 p.m.	Ethics and Professionalism Update Alvin Mathews, Esq.
2:00 - 3:00 p.m.	Economic Update Professor PJ Glandon, Kenyon College
3:00 - 3:15 p.m.	Break
3:15 - 4:15 p.m.	Legislative Update M. Elizabeth Monihan, Esq.

If you would like additional information,
please email trustandinvestments15@parknationalbank.com or call 740-399-5500.

CLE credits: 5.0 General, 1.50 Professional Conduct approved

CPE credits: 6.5 General

CE credits: 5.5 General, 1.0 Ethics approved



About Our Speakers



BRANDON BORGMANN is an attorney with Carlile Patchen & Murphy LLP and focuses his practice on estate and business succession planning, probate, special needs law, and tax. He has served as an adjunct professor at Capital University Law School, teaching estate tax, gift tax, and the income taxation of trusts and estates. He received a B.S. in communications from Ohio University and his law degree from Capital University Law School.



JESSICA FORREST is shareholder in the Cleveland and Akron offices of Reminger Co., LPA, and focuses her practice on matters involving probate litigation, trust disputes, estate administration, and estate planning. She also has experience in probate, real estate, and small business law. She is a graduate of the University of Akron and received her law degree from the University of Akron School of Law.



PHILLIP GLANDON, JR is an associate professor in Kenyon College's department of economics. He joined the department in 2012 after completing his doctorate at Vanderbilt University. Mr. Glandon has been published multiple times, penning articles on the topics of monetary economics and macroeconomics. He has been a presenter at numerous conferences and workshops across the United States.



BRIAN LAYMAN is a principal with the Layman Law Group, LLC. Mr. Layman practices in the areas of tax, asset protection, estate planning, business succession planning, corporate law, and trust and estate administration expertise. He has been certified as a Specialist in Estate Planning, Trust, and Probate Law by the Ohio State Bar Association. Mr. Layman has a B.S. in accounting, Master of Taxation, and law degree from the University of Akron. He is a fellow of the American College of Trust and Estate Counsel.



ALVIN MATHEWS, JR is a partner and litigator at Ulmer Attorneys with experience in complex business and professional liability matters. Mr. Mathews has provided representation on hundreds of legal ethics advisory opinions and lawyer discipline case investigations, including nearly 100 lawyer discipline trials and more than 20 oral arguments before the Supreme Court of Ohio. He completed his undergrad at Miami University and earned his J.D. from Ohio Northern University Pettit College of Law.



M. ELIZABETH MONIHAN is a partner at Schneider Smeltz Spieth Bell LLP. Ms. Monihan's practice is focused on wealth transfer planning for individuals and fiduciaries, including income, gift, estate and generation-skipping transfer tax planning, trust and estate administration, multi-generational family issues, retirement planning, succession planning for closely-held businesses and charitable planning. She is a graduate of John Carroll University and received her J.D. from Cleveland-Marshall College of Law.

Registration

All seminar materials will be provided electronically. Please provide an email address. Printed materials are available for \$40 in advance. No printed materials will be available on the day of the event.

ATTENDEE NAMES _____

COMPANY NAME _____

ADDRESS _____

CITY, STATE, ZIP _____ PHONE _____

EMAIL _____

ATTENDEES (#) _____ x \$100 = \$ _____ PAPER MATERIALS (#) _____ x \$40 = \$ _____ TOTAL DUE \$ _____

Please mail your completed registration form and payment to:

Park National Bank, ATTN: Trust Department, 1 S. Main Street, Mount Vernon, OH 43050.

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