

The Corpus Christi Estate Planning Council presents  
**The Forty-Third Annual Estate Planning Seminar**

Natalie B. Choate, J.D., Nutter, McClennen & Fish LLP  
Dennis Stessman, CLU, ChFC, CFP Advanced Marketing Director-Prudential  
Joel Crouch, J.D.-Managing Partner-Meadows, Collier, Reed, Cousins, Crouch & Ungerman, LLP  
Alan Harp, Managing Director of Valuation & Financial Opinions, Stout Risius Ross, Inc. (SRR)  
Oliver Warnke, Director of Valuation & Financial Opinions, Stout Risius Ross, Inc. (SRR)

FRIDAY, May 13, 2016

AGENDA

8:00 a.m.  
8:20 a.m.  
8:30 a.m.  
9:30 a.m.  
9:40 a.m.  
10:40 a.m.  
  
11:40 a.m.  
11:50 a.m.  
12:50 p.m.  
  
1:50 p.m.  
2:00 p.m.  
  
3:00 p.m.  
4:15 p.m.  
4:30 p.m.  
5:15 p.m.

Registration

Announcements

**IRAs with Hair: What to Do with an IRA that Has a Shady Past** Natalie B. Choate, J.D.

Break

**Death and Taxes: The Inherited Retirement Plan** Natalie B. Choate, J.D.

**12 Life Insurance Mistakes that Are Not "Cheaper by the Dozen"**

Dennis Stessman, CLU, ChFC, CFP

CCEPC Annual Meeting

Lunch

**Where Controversy Meets Planning: New Partnership Audit Rules Create Opportunities & Pitfalls-Part One** Joel Crouch, J.D

Break

**Where Controversy Meets Planning: New Partnership Audit Rules Create Opportunities & Pitfalls-Part Two** Joel Crouch, J.D

**Turning Oil & Gas Valuation "Downside Up" and Resulting Opportunities** Alan Harp

Break

**Grading the Valuation Report** Oliver Warnke

Adjourn

*The CCEPC has applied for continuing education credit for these professions:*

CPAs CFPs, Trust Officers, Attorneys, and Insurance

**Directions to Congressman Solomon P Ortiz International Center**

Take I-37 S toward BAYFRONT/SHORELINE BLVD/C.C.MUSEUM; Turn LEFT onto N CHAPARRAL ST. ; Continue to the very end of N CHAPARRAL ST; Turn LEFT onto 402 HARBOR DR; The Ortiz Center is located directly under the Harbor Bridge to the left.

**Sponsors:**

Coastal Bend Community Foundation, Wells Fargo Wealth Management, Frost Wealth Advisors, South Texas Money Management, American Bank Trust & Asset Management, TAMUCC College of Business and The Division of Institutional Advancement

Registration Fee: \$225 for CCEPC members; \$260 for non-CCEPC members, if registered by **Friday, May 6, 2016**

Registrations received after May 6: \$25 additional. Seminar materials **only**: \$75, if copies are available.

I enclose \$ \_\_\_\_\_ for the seminar/materials/lunch. \$ \_\_\_\_\_ for written materials **only**.

PLEASE PRINT

Name \_\_\_\_\_ Firm \_\_\_\_\_

Street Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Telephone ( ) \_\_\_\_\_ Fax \_\_\_\_\_ Nametag name preference \_\_\_\_\_

Occupation: (Please circle)      Attorney      Trust Officer      Insurance      CPA      CFP      Other

E-Mail address \_\_\_\_\_

Make your check payable to CCEPC and return with this form to:  
For more information: (361) 825-2829 or [eugene.bland@tamucc.edu](mailto:eugene.bland@tamucc.edu)

Please pre-register in order to assure your reservation!

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