

03/17/20

IRS ESTATE AND GIFT TAX EXAMINATIONS IN THE AGE OF HIGHER EXEMPTIONS

JOEL CROUCH

Attendee Last Name	Attendee First Name	Attendee Company	Attendee Fee Type	Attendee Designations
Acerra	Guy	Ameriprise Financial	Member (Sept. 2019-May 2020)	CFP, CLU
Ahlenius	Erik	Jefferson Bank Trust	Member (Sept. 2019-May 2020)	Attorney, Trust Officer
Alcantar	Corrine	USAA FSB Trust	Member (Sept. 2019-May 2020)	
Allums	Tim	Keller Williams Realty	Member (Sept. 2019-May 2020)	Realtor
Amen	Henry	Law Office of Henry J. Amen III	Member (Sept. 2019-May 2020)	Attorney
Augsburger	Bob		Member (Sept. 2019-May 2020)	
Ayala	Leslie	KW Commercial	Guest Fee	CRE Associate
Aymes	Gary	Broadway Bank	Member (Sept. 2019-May 2020)	Trust Officer
Baker	James	USAA FSB	Member (Sept. 2019-May 2020)	CFA
Balmaceda	Susan	Broadway Bank	Member (Sept. 2019-May 2020)	Trust Officer
Banks	John	Banks & Banks, PC	Member (Sept. 2019-May 2020)	Attorney
Bayern	Art	Langley & Banack	Member (Sept. 2019-May 2020)	Attorney
Blair	Whitney	BBVA	Member (Sept. 2019-May 2020)	CTFA, JD
Bonilla	Monica	Broadway National Bank	Member (Sept. 2019-May 2020)	Attorney
Braulick	Todd	Bank of America Private Bank	Member (Sept. 2019-May 2020)	JD
Bressler	Stephen	Duncan Bressler & Williamson, Inc.	Member (Sept. 2019-May 2020)	Attorney
Brown	Spencer	Accountable Aging Care Management	Member (Sept. 2019-May 2020)	Aging Life Care Professional
Brysacz	Matthew	Brysacz Law Firm, PLLC	Member (Sept. 2019-May 2020)	Attorney
Burke	Tracey	theKFORDgroup.com	Member (Sept. 2019-May 2020)	CPA, CFP
Carlton	Kristin	Exencial Wealth Advisors	Member (Sept. 2019-May 2020)	CFP

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Carroll	Kalyn	ATKG	Member (Sept. 2019-May 2020)	CPA
Christie	B. Corbett	Texas Biomedical Research Institute	Member (Sept. 2019-May 2020)	
Clausen	Steve	Caldwell East & Finlayson PLLC	Member (Sept. 2019-May 2020)	Attorney
Coggins	Charles	Charles E. Coggins, CPA	Member (Sept. 2019-May 2020)	CPA
Cornelious Almaraz	Hayley	ATKG	Guest Fee	
Countryman	Stephen	Frost Bank	Member (Sept. 2019-May 2020)	JD
DeLeon	Jaime	USAA	Member (Sept. 2019-May 2020)	CFP
DOTY	NATHAN	FROST BANK	Member (Sept. 2019-May 2020)	
DOTY	NATHAN	FROST BANK	Member (Sept. 2019-May 2020)	CWS
Edelman	Amelia	Porter, Rogers, Dahlman & Gordon, P.C.	Member (Sept. 2019-May 2020)	Attorney
Edwards	Jennifer	theKFORDgroup.com	Member (Sept. 2019-May 2020)	CPA/CFF, CVA
Enriquez	Mary	The Forum at Lincoln Heighu	Member (Sept. 2019-May 2020)	
Espinosa	Roberto	Northwestern Mutual	Member (Sept. 2019-May 2020)	Wealth Management Advisor
Ethridge	Leanne	Frost	Member (Sept. 2019-May 2020)	Trust Officer
Ewald	Allen	Kreager Mitchell	Member (Sept. 2019-May 2020)	Attorney
Ewald	Allen	Kreager Mitchell, PLLC	Member (Sept. 2019-May 2020)	Attorney / CPA
Ford	Kimberly	Clark Hill Strasburger	Member (Sept. 2019-May 2020)	
Ford	Kimberly	TheKFORDGroup	Member (Sept. 2019-May 2020)	CPA, CVA, MAFF
Ford	Jill	McReynolds & Tye, P.C.	Member (Sept. 2019-May 2020)	
FROEMSDORF	ELINOR		Member (Sept. 2019-May 2020)	CLU, ChFC, AEP
Garcia	Marcelino	KW Commercial	Guest Fee	Broker Associate
Garcia III	J Alex	Caldwell East & Finlayson, PLLC	Member (Sept. 2019-May 2020)	Attorney

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Gerdes	Charlie	Family Tree In Homecare	Member (Sept. 2019-May 2020)	
Gill	Alicia	Hornberger Fuller & Garza	Member (Sept. 2019-May 2020)	CPA
Giltner	Maggie	Clark Hill Strasburger	Member (Sept. 2019-May 2020)	Attorney
Gonzalez	Maira	Duncan, Bressler & Williamson, Inc.	Member (Sept. 2019-May 2020)	Attorney
Grater	Teryn	ATKG	Guest Fee	
Gurwitz	Ben	Financial Life Advisors	Member (Sept. 2019-May 2020)	CFP(r)
Hairston	David		Member (Sept. 2019-May 2020)	
Harris	Stephanie	S Harris Financial Group, LLC	Member (Sept. 2019-May 2020)	CFP
Hasting	Howard		Member (Sept. 2019-May 2020)	Attorney
Heintzelman	Storey	Heintzelman Law PLLC	Member (Sept. 2019-May 2020)	Attorney
Hernandez	Anais	Jefferson Bank	Member (Sept. 2019-May 2020)	A.V.P & Trust Officer
Hetrick	Elizabeth	Broadway Bank	Member (Sept. 2019-May 2020)	JD CTFA
Hughes	Shawn	Broadway Bank	Member (Sept. 2019-May 2020)	JD
jackson	charles	langleybanack	Member (Sept. 2019-May 2020)	attorney
Jarzombek	Tammy	USAA Trust Services	Member (Sept. 2019-May 2020)	CTFA
Jones	Dave	Heard & Smith, LLP	Member (Sept. 2019-May 2020)	Attorney
Jones	Emory	Edward Jones	Member (Sept. 2019-May 2020)	CFP
Kennedy	Kevin		Member (Sept. 2019-May 2020)	Attorney
King	Greg	Kreager Mitchell	Member (Sept. 2019-May 2020)	
King	Brit	New Braunfels Community Foundation	Member (Sept. 2019-May 2020)	
Klein	Michael	Centennial Bank	Member (Sept. 2019-May 2020)	ChFC, CLU, CRPC, AAMS, CWS

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Kreager	Mike	Kreager Mitchell PLLC	Member (Sept. 2019-May 2020)	Attorney
Lacy	Karen	Bank of Texas	Member (Sept. 2019-May 2020)	Vice President
Lamon	David	Reagan Burrus PLLC	Member (Sept. 2019-May 2020)	Attorney
Landin-Penirelli	Erika	Frost Bank	Member (Sept. 2019-May 2020)	
Leach	Jason	Reagan Burrus PLLC	Member (Sept. 2019-May 2020)	Attorney
Lopez	Carlos	USAA	Member (Sept. 2019-May 2020)	
Lovell	Matthew	McReynolds & Tye, P.C.	Member (Sept. 2019-May 2020)	Attorney
Magoo	Rosiee	Law Office of Rosiee Magoo	Member (Sept. 2019-May 2020)	Attorney
McNeil	Carol		Member (Sept. 2019-May 2020)	
Mewborne	Michael	Morrison & Mewborne Private Wealth Management Group	Member (Sept. 2019-May 2020)	Financial Advisor / Attorney
Miller	Lauren	Langley & Banack	Member (Sept. 2019-May 2020)	Attorney
Mitchell	Darin	Bank of Texas	Member (Sept. 2019-May 2020)	JD
Morris	David	Gately & Morris, PC	Member (Sept. 2019-May 2020)	attorney
Netting IV	Conrad	Advisor-Trustee	Member (Sept. 2019-May 2020)	CPA
Netting, V	Conrad	American Bank	Member (Sept. 2019-May 2020)	J.D.
Norton	Julie		Member (Sept. 2019-May 2020)	CPA, Retired
Nourie	Kimberly	Financial Life Advisors	Member (Sept. 2019-May 2020)	CPA, CFP
Occhipinti	Matthew	Northwestern Mutual	Member (Sept. 2019-May 2020)	CLU, ChFC, CFP, AEP
Oliver	Jim	Calvetti Ferguson	Member (Sept. 2019-May 2020)	CPA, CFP
Pape	Patrick J.		Members/Renewals (Sept. 2019-May 2020)	Attorney
PARENTI	PETER	PETER J. PARENTI, A PROF. CORP	Member (Sept. 2019-May 2020)	Attorney

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Peace	Tyler	Elder Bray & Bankler PC	Member (Sept. 2019-May 2020)	Attorney
Polansky	Edward	Edward Polansky Inc.	Member (Sept. 2019-May 2020)	CPA/PFS
Ramsey	Amber	Ramsey Law PLLC	Member (Sept. 2019-May 2020)	Attorney
Reid	Eric	Frontier Investment Management	Member (Sept. 2019-May 2020)	CFP
Ressmann-Gray	Ashley	Schoenbaum Curphy & Scanlan, P.C.	Member (Sept. 2019-May 2020)	Attorney
Rodriguez	Lorena	Frost	Member (Sept. 2019-May 2020)	Administrative Officer
Rogers	John	Frost Bank	Member (Sept. 2019-May 2020)	CWS, CTFA
Rogers	Marcus		Member (Sept. 2019-May 2020)	Attorney
Roos	Marty	Clark Hill	Member (Sept. 2019-May 2020)	Attorney
Rowe	Mary	Kreager Mitchell	Member (Sept. 2019-May 2020)	
Rubsamen	Rollins	Graystone Consulting	Member (Sept. 2019-May 2020)	QPFC
Samas	Mark	Weilbacher & Associates, P.C.	Member (Sept. 2019-May 2020)	CPA
Scheuerman	Hella	Scheuerman Law Firm, PLLC	Member (Sept. 2019-May 2020)	Attorney
Schmidt	Ronald	Schmidt and Wenzel PC	Member (Sept. 2019-May 2020)	Attorney
Sciano	Daniel	Tinsman & Sciano, Inc.	Membership Fee - New Members/Renewals (Sept.	
Seitz	Casey	Broadway Bank	Member (Sept. 2019-May 2020)	
Smith	Mark	Heard & Smith, LLP	Member (Sept. 2019-May 2020)	attorney
Smith	Andrew	Heard & Smith, LLP	Member (Sept. 2019-May 2020)	attorney
Smith	Carolyn	C3 Financial Partners	Member (Sept. 2019-May 2020)	CPA, AEP, CAP
Soat	Richard	BDO	Member (Sept. 2019-May 2020)	CPA
Solcher	Whitney	Ulrich Investment Consultants	Member (Sept. 2019-May 2020)	CFA

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standley	mason		Member (Sept. 2019-May 2020)	Attorney
Strait	Elizabeth	Broadway Bank	Member (Sept. 2019-May 2020)	Attorney
Thomas	Nancy	Frost Investment Services, LLC	Guest Fee	
Tottenham	Candace	American Bank	Member (Sept. 2019-May 2020)	CFIRS
Trimble	Tom	Thomas A. Trimble, CPA	Member (Sept. 2019-May 2020)	CPA
Trowsdale	Helen	AA CAre Services	Member (Sept. 2019-May 2020)	Nurse
Tye	Richard	McReynolds & Tye, P.C.	Member (Sept. 2019-May 2020)	Attorney
Velasco	J. Miguel	Harvest Future Financial	Member (Sept. 2019-May 2020)	Executive Partner
Voeller	Jim	The Voeller Law Firm	Member (Sept. 2019-May 2020)	Attorney
Vogt	Robert	Vogt Auction	Membership Fee - New Members/Renewals (Sept.	Appraiser
Walker	Marvin	Matteson, Harwood & Walker, Inc	Member (Sept. 2019-May 2020)	CLU, ChFC
Wallace	Margaret	Weaver LLP	Member (Sept. 2019-May 2020)	CPA
Warren	Mike	Mike Warren, Attorney	Member (Sept. 2019-May 2020)	Attorney
Webb	Heather	Argent Trust Company	Member (Sept. 2019-May 2020)	JD, CPA, Trust Officer
Weilbacher	Bruce	Weilbacher & Associates	Member (Sept. 2019-May 2020)	CPA
Weilbacher	Kim	Weilbacher & Associates	Member (Sept. 2019-May 2020)	CPA
Werner	Carl	Carl Werner & Associates	Member (Sept. 2019-May 2020)	Attorney
West	David	Dykema	Member (Sept. 2019-May 2020)	Attorney
White	David	Frost Bank	Member (Sept. 2019-May 2020)	Attorney/CPA
Whitten	Lacey	law office of Lacey Whitten	Member (Sept. 2019-May 2020)	Attorney
Wiesner	Susan	American Bank	Member (Sept. 2019-May 2020)	CTFA AEP

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Wilkes	Michael	Madalene Cain Charitable Foundation	Member (Sept. 2019-May 2020)	Attorney
Winborn	Dawn	Frost Insurance	Member (Sept. 2019-May 2020)	CIC
Wnuk	Todd	Broadway Bank	Member (Sept. 2019-May 2020)	CFP
Wolff III	Harry W.	Uhl Fitzsimons Jewett Burton & Wolff PLLC	Member (Sept. 2019-May 2020)	Attorney
Wood	Dorothy	Frost	Member (Sept. 2019-May 2020)	CFP
Wood	Michelle	Edward Jones	Member (Sept. 2019-May 2020)	AAMS
Wyckoff	Polly	RSM	Member (Sept. 2019-May 2020)	CPA
Zajac	Daniel	USAA	Member (Sept. 2019-May 2020)	