**SALT LAKE ESTATE**

**PLANNING COUNCIL**

2019 Fall Institute Agenda

8:00 am to 8:30 am Registration and Continental Breakfast

8:30 am to 8:45 am Welcome

8:45 am to 10:45 am **Some of the Best New Planning Desserts That Are Tax Diet Friendly**

Stacy Eastland: The Goldman Sachs Family Office

10:45 am to 11:00 am Networking Break

11:00 am to 12:00 pm **Views on Tax Reform and Business Incentives**

Lt. Governor Spencer Cox

12:00 pm to 12:10 pm Networking Break

12:10 pm to 1:05 pm **LUNCH SPEAKER**

**Behavioral Economics- Common Investor Mistakes that can cost you and your Trusts Thousands of Dollars**

Jason Ware: Albion Financial

1:20 pm to 2:20 pm **Purposeful Trusts & Legacies: How do We Purposefully Move Away from the “Tax Tail Wags the Rest of the Estate Plan”**

John A. Warnick: Founder of the Purposeful Planning Institute

2:25 pm to 3:25 pm **Purposeful Trusts are Revolutionary- Easy to Apply Lessons from the Last Will and Testament of George Washington**

John A. Warnick: Founder of the Purposeful Planning Institute

3:30 pm to 4:30 pm **What, Grandma Made Uncle Rico Trustee?**

**(Advising Non-professional Fiduciaries)**

Michael Giles: Bennett, Tueller, Johnson & Deere

4:30 pm Adjourn