



## ALL PROGRAMS

Registration & Networking – 11:30 to 12:00 PM  
Lunch & Program – 12:00 to 1:15 PM  
Missouri Athletic Club – 405 Washington Avenue, St. Louis, MO  
Cost: \$25 Members, \$50 Guests

**SEPTEMBER 30, 2019**

*A Deeper Look at Social Security Benefits*

Guest Speaker: Jody Harris



**OCTOBER 21, 2019**

*Family Matters For Business Owning Families*

Guest Speaker: Claudia Sangster

**NOVEMBER 18, 2019**

*Estate Planning Paralysis: Getting Your Clients to Act*

Guest Speaker: Justin Miller



**DECEMBER 16, 2019**

*Special Needs Trusts v ABLE Accounts*

Guest Speaker: Martha Brown

**JANUARY 27, 2020**

*Best Planning Ideas For 2020*

Panel: Steve Gorin, John Scott, Michael Tessler and Kathleen Bilderback



**FEBRUARY 24, 2020**

*Income Tax Update: Planning Opportunities and Pitfalls as Your Clients Prepare to File 2019 Returns*

Guest Speaker: Douglas M. Mueller

**MARCH 23, 2020**

*Today's Increasing Need For Long Term Care Planning*

Guest Speaker: Wendy Boglioli



**APRIL 27, 2020**

*Strategies, Traps and Solutions for Charitable Uses of Retirement Assets*

Guest Speaker: Christopher Hoyt

**MAY 18, 2020**

*Finding Basis – It May Not Be Where You Thought it Was*

Guest Speaker: Howard Zaritsky

