



## Estate Planning Council of Saint Louis

Dear Membership,

Welcome to our 2022-23 Season! I hope you all thoroughly enjoyed your summers and had a lovely Labor Day weekend with family and friends. I am thrilled to unveil a spectacular line up of speaker events for our monthly luncheon meetings this year and to share the excitement that your Board of Directors and I have for our St. Louis Estate Planning Council community post-Covid.

First, I want to express that it is an honor to serve as your President this year and to have the privilege to contribute to our Council as so many of you have done before me – each of you is the lifeblood of our organization. Our Council brings us together from a wide array of disciplines, areas of expertise, and professional organizations of varied sizes and specialties. From our new young professionals to our most prominent nationally recognized colleagues, our membership is rich, deep, and extraordinary.

Our 2022-23 Season will kick off with our Happy Hour Event tomorrow night, Thursday, September 8<sup>th</sup>, 4-6pm, at Peel Wood Fired Pizza, 208 S. Meramec in Clayton, co-sponsored by our friends, the St. Louis Council of Charitable Gift Planners (SLCCGP), and the National Association of Insurance & Financial Advisors – Missouri (NAIFA), St. Louis Estate Buyers and YouthBridge Community Foundation. If you have not yet registered for this Happy Hour event, you can do so [HERE](#). This event is free to our members. I look forward to seeing each one of you there.

This month also kicks off our 2022-2023 Speaker Series – consisting of nine monthly luncheon meetings, all designed to offer preeminent continuing professional education to our membership and guests. This season we have the privilege of welcoming a phenomenal array of national speakers, all of whom plan to join us in person in St. Louis. The “bookends” of our series set our stage – we begin our season on September 19<sup>th</sup> with the esteemed Louis S. Harrison of Harrison & Held offering perspective on both substantive practice and personal practice management, with a presentation entitled “Preparing for the Next Congressional Tax Tsunami while Avoiding Premature Activation of Our Own Estate Plans.” For our season finale, we have the privilege of hosting Martin M. Shenkman in May of 2023. In between, it will be hard to beat our extraordinary line-up. In October, we will be honored with the presence of scholar and practitioner Ann B. Burns, a Lathrop GPM colleague, who will present to us on “Business Planning Strategies – Tips, Traps and Common Mistakes.” Zac McClure, co-Founder of the crypto tax services firm, Token Tax, will join us in November to present on Crypto Currency and Crypto Tax Returns and offer his unique perspective that can only come from actively servicing clients engaged at the very heart of this arena. Sonia Desai and Will Frazier of Weaver from Austin, Texas will join us in December to present “FLPs in Tax Court: Emphasizing the Discount for Lack of Marketability.” And in February, Michael Kitces of Buckingham Wealth and “Nerd’s Eye View” at Kitces.com will join us for a special event co-hosted by our friends, the Financial Planners Association of Greater St. Louis (FPA). These are our national guests – and my excitement is further magnified by the opportunity to announce our presenters in a special offering we also have for you this year – our “St. Louis Practicing Scholars

Series” – a 3-part series designed to celebrate and highlight our own rich community of talented practitioners. Back by popular demand, our first instance of this series will be presented in January by panelists Steve Gorin, John Scott, and Michael Tessler, with moderator Kathleen Bilderback, who will discuss “Best Planning Ideas for 2023.” In March, the second part of this series brings us another esteemed panel of colleagues, T. Jack Challis, Carolyn Ohlsen, and Samir Tayob, with moderator Michael Foster, who will present to us on “Trust Fiduciaries.” The final iteration of this series will be in April, and will include Clary Redd, Kathy Sherby and Michael Downey, with moderator Jason Thein, who will present to us on “Estate Planning Ethics.” Can you stand the thought of missing even one of these extraordinary events?

As another important and fun note - we are trying something new this year and will be splitting our monthly meetings between two locations – (1) our traditional location at the Missouri Athletic Club (MAC) Downtown, and (2) the Saint Louis Club, in the Pierre Laclede Building at 7701 Forsyth, in Clayton. I am proud to continue our legacy support for the MAC Downtown, (which also translates into continued support for the St. Louis downtown area), and at the same time, pleased to offer our membership meetings at the historic Saint Louis Club in Clayton before it closes its doors at its legacy location and moves across the street to the Centene Building in 2023. Please keep an eye out for which location is assigned to each monthly meeting. Also, as part of our effort to harvest silver linings, we will continue to provide our Zoom meeting offerings for those unable to join us in person. Mostly, however, I hope you will plan to join me in regularly attending each monthly meeting in person.

This is your St. Louis Estate Planning Council community. Your participation and presence are important and meaningful, as you are the designers of its legacy. I look forward to seeing you at Peel Wood tomorrow evening, at the Saint Louis Club on September 19, and at each upcoming monthly meeting thereafter. I encourage you to be active – register for events online, check out our new Emeritus Membership category, join a committee, and encourage your colleagues to join you as guests and to become our new members. Also - get to know your [2022-23 Board of Directors](#) – please reach out to any one of us any time with your thoughts, insights, and feedback. We look forward to being with you!

Best Regards,



Robynn Ragland  
President  
Estate Planning Council of St. Louis