

Save the Date!

2018 CANNON Estate Planning LUNCH & LEARN

Jan. 23: Designing Estate Plans to Withstand Challenges

Feb. 27: Modification and Termination of Trusts: A Double-Edged Sword

March 27: Charitable Giving: Seeking the Perfect Match Between Donor and Donee

April 24: Developments in Trust and Estate Administration and Fiduciary Liability

May 22: Engaging the Next Generation of Estate Planning Clients

June 26: Ethics Issues Facing Trusts and Estates Practitioners

July 24: Management (and Mismanagement) of Trust Assets

Aug. 28: Retirement Asset Planning For Estate Planners: Compelling Practical Advice

Sept. 25: Estate Planning and Administration Issues for the Elderly and Disabled

Oct. 23: Income Tax Considerations in Estate Planning and Estate and Trust Administration

Nov. 6: Directed Trusts: Understanding the Risks and Avoiding Liability

Dec. 11: Ensnared in an Ethics Trap: Navigating Conflicts of Interest

Free 1.5 hours Continuing Education Credit for CPAs, CFPs, CTFAs, CWSs, CLEs, AFIMs, CLUs, ChFCs and attorneys.

Lunch at 11:30 a.m.
Each session begins at 12 p.m.

**Oklahoma City
Community Foundation**
1000 N. Broadway Ave.
Oklahoma City

Register at occf.org/ceopportunities.

A Program of the  OKLAHOMA CITY COMMUNITY FOUNDATION

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Contact **Joe Carter** at j.carter@occf.org or
405/606-2914 to learn more.



**OKLAHOMA CITY
COMMUNITY FOUNDATION**

Helping you help the community

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