FREE LIFE PLANNING FORUM

Living Your *Legacy*

SPEAKER SERIES

Missouri Botanical Garden
4344 Shaw Boulevard, St. Louis, MO 63110

10 am to 12 pm

Light *fare du jour* and refreshments will be served.

Join us for any or all of the dates listed below:

Thursday, July 13, 2023 Series Topics	Speakers
Successfully preparing your Children and Grandchildren for Family Wealth	Karen Blumeyer
Lasting Legacy – Imparting Your Values to the Next Generation	Paul Gantner
A Few Simple Ways to Integrate Charitable Giving	Bryan Cernicek
Panel Discussion: Philanthropy and Family Values	Karen Blumeyer Paul Gantner Bryan Cernicek

Thursday, October 12, 2023 Series Topics	Speakers
Lessons Learned – Avoiding Pitfalls Choosing an Executor or Trustee	Jack Challis
Panel Discussion: Costly Planning Mistakes Families Make	Paul Gantner Adam Ford Jack Challis

Thursday, November 9, 2023 Series Topics	Speakers
Philanthropy and the IRS – Current and Pending Tax Benefits	Larry Katzenstein
Panel Discussion: Simple Giving, DAFs, IRAs and Taxes	Bryan Cernicek Larry Katzenstein Dominic Pisoni Lauren Wagner

To RSVP, call 314-633-7351 or email Rose.Brower@ssmhealth.com

Living Your Legacy is a planned giving series jointly sponsored by SSM Health Cardinal Glennon Children's Hospital and the Missouri Botanical Garden.

Living Your *Legacy* panel of experts

Karen Blumeyer has practice expertise in the area of personal estate planning, which includes Wills, Trusts, Family Limited Partnerships, Probate Estates, Charitable Foundations and Pre-nuptial Agreements. She has been named a Five Star Wealth Manager in St. Louis Magazine. She is an active volunteer in the St. Louis community, having chaired several special events and fundraisers. Karen received her Juris Doctorate from Southern Methodist University School of Law in 1977. She graduated with honors from Duke University in 1975. Prior to entering private practice in 1991, Karen had 13 years' experience with local St. Louis banking institutions and as legal counsel for a major St. Louis trust department.

Bryan Cernicek has been serving the financial needs of individuals, families and business owners for more than 30 years. He strives to develop long-term relationships with his clients with the objective of understanding their goals and providing viable solutions for every element of the wealth management equation. Originally from St. Louis, MO, Bryan graduated from Truman State with a bachelor's degree in Psychology. He has earned the professional designation of Accredited Asset Manager Specialist℠ from the College for Financial Planning. Prior to joining Raymond James in 2022, Bryan worked for Edward Jones for 29 years.

T. Jack Challis is managing director for estate planning strategies at Midwest Trust Company and has more than 40 years of experience in law practice and trust department management. He has an extensive career in wealth planning. Mr. Challis is a Fellow of the American College of Trust and Estate Counsel since 1988 and has served as Missouri State Chair of the College. He is also a member of the College's Fiduciary Litigation Committee and State Laws Committee and is active in many community organizations. Jack is an honors graduate of St. Louis University School of Law and a graduate of Creighton University.

Adam Ford is an advisor with Moneta Group where he acts as a fiduciary for client's wealth management needs, including financial planning, tax planning and estate planning guidance. Through his services, Adam has guided numerous clients through complex financial planning matters, including purchasing/selling a business, advanced estate planning techniques and advanced philanthropic planning. At his core, Adam has a passion for helping families navigate life's path through all their financial needs and works tirelessly to help them achieve their financial and wealth goals.

Paul Gantner is owner of the estate planning and elder law firm Amen, Gantner and Capriano. Along with his law degree, Paul holds an MBA, is Veterans Affairs accredited, holds an active insurance license and is Series 65 licensed as an investment adviser. Paul frequently speaks for the Missouri Bar and other organizations. He is rated 10 out of 10 on AVVO which considers experience, notoriety and both peer and client reviews. Paul's mission is to help families secure their legacies by embracing clients as members of his law firm family through long-term, personal advisory relationships.

Dominic Pisoni is a Partner in RubinBrown's Entrepreneurial Services Group. He has over 20 years of public accounting experience, focusing his efforts on privately held businesses and start-up companies. He serves clients in many industries with a variety of business needs including financial statement preparation, outsourced accounting and tax return preparation and planning. Dominic received a B.S. in Accounting from Truman State University. He is a Member, Missouri Society of Certified Public Accounts and Member, American Institute of Certified Public Accountants.

Larry Katzenstein is a nationally-known authority on estate planning and exempt organizations, and a frequent speaker to professional groups nationally. He divides his practice between representation of wealthy individuals in estate and philanthropic planning and serving as outside counsel to exempt organizations nationwide. He appears annually on several American Law Institute estate planning programs and has spoken at many other national tax institutes, including the Notre Dame Tax Institute, the University of Miami Heckerling Estate Planning Institute and the Southern Federal Tax Institute. Larry has served as an adjunct professor at the Washington University School of Law, where he has taught both estate and gift taxation and fiduciary income taxation.

Lauren N. Wagner is a director at Armanino, serving as a leader in the St. Louis office's Estate, Gift and Trust practice. Lauren spent the first six years of her career at a boutique law firm, drafting and implementing estate plans and working through complex estate planning and administration issues. Recently, her practice has focused on tax compliance and planning in the accounting firm setting. Lauren has extensive knowledge and experience in all phases of estate planning and administration, including income tax planning and compliance issues involving individuals, trusts and estates.