FREE LIFE PLANNING FORUM

Living Your *Legacy*

SPEAKER SERIES

Missouri Athletic Club West, The Town and Country Room
1777 Des Peres Rd, Des Peres, MO 63131

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, May 14, 2026 Series Topics	Speakers
Cybersecurity and Fraud: Protecting Your Assets	Mark Clark Robert Rudloff
Panel Discussion	Dominic Pisoni David Skaggs Special Guest

Wednesday, August 26, 2026 Series Topics	Speakers
What is your Wealth Transfer Strategy?	Paul Gantner
Panel Discussion	T. Jack Challis Adam Ford Deborah Smiley

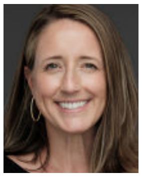
Wednesday, October 7, 2026 Series Topics	Speakers
Smart Tax Planning: A Pro's Take on Everything Your Friends are Talking About. Come with all your tax planning questions!	Hannah Castellano
Panel Discussion	Adam Ford Paul Gantner Michael Niemann

SSMHealth
CardinalGlennon
Children's Hospital

Scan here to RVSP ONLINE »

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

Living Your *Legacy* panel of experts



Hannah Castellano is an Investment Advisor with RubinBrown Advisors and Partner with RubinBrown LLP. Hannah works closely with clients, building trusted relationships as she helps define their objectives in the development and execution of comprehensive financial plans. She enjoys being part of a team assembled to help families and organizations plan for and navigate life's main events. A CPA and Certified Financial Planner, Hannah graduated from the University of Missouri – Columbia with a Masters in Accountancy. Prior to joining RubinBrown Advisors in 2016, Hannah worked as an auditor in RubinBrown's Assurance Services Group.

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. Jack is a Fellow of the American College of Trust and Estate Counsel since 1988 and has served as Missouri State Chair of the College. Jack is also a member of the College's Fiduciary Litigation Committee and State Laws Committee and is active in many community organizations. He is an honors graduate of St. Louis University School of Law and a Creighton University alum.

Mark Clark, CPA, CISSP, CISA, CEH is a manager in RubinBrown's Consulting Services Group and leads its Compliance and Frameworks team. A retired Marine, Mark has 21 years of information security experience involving assessment and accreditation, compliance, risk assurance, and secure system configuration. Mark has spent 14 years assessing and securing Department of Defense (DoD) systems and DoD contractor systems. He is a Certified Information Systems Auditor (CISSP), Certified Public Accountant (CPA), (CISA), Qualified Security Assessor (QSA), Payment Card Industry Professional (PCIP), Certified Ethical Hacker (CEH), Certified Cybersecurity Maturity Model Certification (CMMC) Assessor (CCA) and holds a Network+ certification.

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 the 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 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 invest-ment advisor. Paul frequently speaks for the Missouri Bar and other organizations and was a 2022 member of the St. Louis Business Journal's 40 under 40. Paul's firm is built on the tenet that in modern estate and wealth planning, the middle class deserves a legacy too through white-glove, long term advisory services.

Chad M. John, CPA/CFF, CFE received his Master of Accounting, emphasis in Forensic Accounting, from Florida Atlantic University. He is a licensed CPA in the state of Missouri, certified in Financial Forensics. He is also a Certified Fraud Examiner. He has worked in public accounting in audit for a Big 8 Public Accounting Firm, retired from the federal government after a career in federal law enforcement working primarily complex financial crimes and public corruption, and served as Internal Auditor for a state department in Missouri. Chad has taught Forensic Accounting as an adjunct instructor for several years.

Michael Niemann is CEO and Founder of the Niemann Group. Michael has over 30 years of experience. He focuses on high-end tax, estate planning, succession planning, and life insurance ideas for his clients. Michael has been very active with both identifying and helping to resolve tax issues often resulting in substantial income and estate tax savings. He is a Certified Public Accountant and a member of the AICPA and the Missouri Society of CPAs. Michael also is an Accredited Estate Planner, Charter Global Management Advisor, Trust and Estate Practitioner, Charter Financial Consultant, and Charter Life Underwriter.

Dominic Pisoni is a Partner in RubinBrown's Entrepreneurial Services Group. He has over 20 years of public accounting experience, focusing his efforts with 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.

Robert Rudloff, CISSP, CISA, QSA is a Partner in RubinBrown's Consulting Services Group with more than 25 years of information security experience on security reviews, mitigation, strategy, and architecture development. He consults with clients on a variety of information security projects ranging from penetration testing to security assessments, to implementation of security architectures, and serving as a vCISO. Rob began his career with the Air Force, serving at the Pentagon and the National Security Agency before transitioning to a consulting career with a Big Four firm as well as several smaller firms focusing on information security and project management. In his most recent role, he served as the Chief Information Security Officer for a large, higher education institution.

Dave Skaggs is Executive Director of Commercial Banking at JPMorgan Chase, where he leads business development efforts across the state of Missouri. He provides treasury solutions and financing to companies with annual revenues exceeding $20 million. With more than half of his career spent advising closely held businesses, Dave also brings experience as a J.P. Morgan Private Bank client advisor and as a former small business owner.

Deborah Smiley, JD, AEP®, CFP®, specializes in estate and business planning. Deborah holds the designation of Accredited Estate Planner® (AEP®). This designation is a graduate level specialization in estate planning. She attended The University of Kentucky where she received her Bachelor of Arts in Political Science Cum Laude and received her J.D. Deborah is a member of the Missouri Bar, Past Chair of the BAMSL's Probate and Trust Committee, serves on The Cardinal Glennon Hospital Legacy Board and The St. Louis Missouri Humane Society's Women's Leadership Council.

RVSP ONLINE at glennon.org/livingyourlegacy
or call 314-633-7351 or email Rose.Brower@ssmhealth.com