

**THE DALLAS ESTATE PLANNING COUNCIL**  
P. O. Box 38553, Dallas, Texas 75238-8553 Tel: 214-340-8020  
E-mail: [dallasepc@yahoo.com](mailto:dallasepc@yahoo.com) Website: [www.dallasepc.org](http://www.dallasepc.org)

**BREAKFAST MEETING**  
**THURSDAY, OCTOBER 4, 2018**  
Breakfast served 7:30-8:00 a.m.; Program 8:00-9:00 a.m.)

**NORTHWOOD CLUB**  
6524 Alpha Road, Dallas, Texas

**RESERVATION DEADLINE: WEDNESDAY, SEPTEMBER 26, (5:00 P.M.) (PAYMENT MUST BE IN COUNCIL'S OFFICE)**

**A Drill Down View of the Next Tax Bill and It's Income Tax Implications**  
**VANCE MAULTSBY**

*Sponsored by Highground Advisors*

The presentation will cover important changes made by the 2017 Tax Cuts and Jobs Act to income taxation of individuals, as well as the income taxation of trusts and estates. We will discuss the law and guidance that has been issued by the Internal Revenue Service. Much guidance is yet to be given in many areas. Accordingly, tax planning is complicated in this environment. Planning is made even more complicated by the fact that most changes to income taxation of individuals, trusts and estates are temporary. They "sunset" at the end of 2025. We will review several case studies about of what the TCJA changes mean to individuals – the good, the bad and the ugly. **Vance Maultsby** is a Shareholder at Huselton, Morgan & Maultsby in Dallas. Vance was a standout student at the University of North Texas where he graduated Summa Cum Laude with an undergraduate degree in accounting and was recognized as the Outstanding Graduate Student in the College of Business while studying for his master's degree. A sizable part of Vance's practice involves the petroleum industry. Additionally, Vance provides personalized services and solutions to high net worth family groups, by addressing their complex and unique business, wealth management and philanthropic issues. Vance is on the graduate school faculty at University of North Texas where he teaches the oil and gas taxation class. He also is on the board of advisers of the Institute of Petroleum Accounting at UNT.

There is continuing ed credit pending for this presentation. **The program handouts** are paperless. The handout will be available to download on the website (Document Library) a few days prior to each meeting. **YOU** may print the handout if you prefer to have a handout at the meeting.

**Note: Paid membership dues do not include meals.** To register for the meeting, complete the form below, enclose a check (**payable to Dallas Estate Planning Council**) for the respective amount (indicated below) and mail to: Dallas Estate Planning Council, **P.O. Box 38553**, Dallas, TX 75238-8553. You may register online with a credit card payment on the website: go to [www.dallasepc.org](http://www.dallasepc.org), look for "Upcoming Events" on the left column and click on the date – Event Details, scroll down to the bottom of the page and register. **LOG IN IS NOT REQUIRED TO REGISTER.** **If you need a receipt, print out the confirmation page.**

**PREPAID MEALS:** Members who have already paid in advance for all meetings for the year **MUST** register so we will have a count for the number of meals to prepare. **PREPAID MEMBERS MUST REGISTER ON THE WEBSITE BY THE DEADLINE** - go to [www.dallasepc.org](http://www.dallasepc.org), look for "Upcoming Events" on the left column, click on the date for Event Details, scroll down to the bottom of the page and register.

**THERE WILL BE 10 MEALS AVAILABLE FOR WALK-INS ON DAY OF MEETING (FIRST COME, FIRST SERVE). ALL OTHER WALK-INS WILL BE "PROGRAM ONLY". CREDIT CARDS ARE NOT ACCEPTED AT THE DOOR, CASH OR CHECK ONLY.** Member: \$37 (includes meal and program); Guest: \$60 (includes meal and program);\*Member-Program Only: \$25 (**\*ONLY MEMBERS** may choose "program only" for \$25; \$20 - **GUEST - Emerging Professionals – FIRST MEETING** (includes meal/program-**MUST** be 40 years of age or younger or less than 5 years in respective discipline – **MUST REGISTER BY THE DEADLINE**)

Name: \_\_\_\_\_ \$37 \_\_\_\$60\_\_\_\$25 (Member-Program Only) \_\_\_\$20 (GUEST EP-First Meeting)  
E-mail: \_\_\_\_\_ Phone No: \_\_\_\_\_

WE WOULD LIKE TO THANK OUR MEETING SPONSORS: **ARMANINO LLP, BESSEMER TRUST COMPANY, CLIFTON LARSEN ALLEN, COMMUNITIES FOUNDATION OF TEXAS, DALLAS WOMEN'S FOUNDATION, FROST BANK, HIGHGROUND ADVISORS, JACKSON, WALKER,, PARKLAND FOUNDATION, QUEST CAPITAL MANAGEMENT, THE CATHOLIC FOUNDATION AND TOLLESON WEALTH MANAGEMENT. IT IS THE SPONSORS WHO MAKE POSSIBLE THE SOCIAL EVENTS AND PROVIDING EXCELLENT SPEAKERS.** IN ADDITION, WE WOULD LIKE TO RECOGNIZE THE PATRONS: **ALTAVIEW ADVISORS, BISIGNANO HARRISON & NEUHOFF, CROCKETT, MCBRIDE & ASSOCIATES, DAVIS STEPHENSON, GLAST, PHILLIPS & MURRAY, GOLDIN PEISER & PEISER, PLAINSCAPITAL BANK, SIGNET ART AND THE CATHOLIC FOUNDATION. THE PATRON PROGRAM PROVIDES ADDITIONAL FUNDS TO SUPPORT THE COUNCIL'S ACTIVITIES.**

**REMAINING DEPC SCHEDULE:**

**NOVEMBER 1: LUNCH/DOUBLETREE HILTON**

SPEAKER: Bryan Clontz

TOPIC: Charitable Giving Trends

**DECEMBER 6: LUNCH/DOUBLETREE HILTON**

SPEAKER: Hugh Magill

TOPIC: Wealth Transfer Planning: Reimagining the Estate Planning Paradigm for the Contemporary Family

**2019:**

**JANUARY 10: BREAKFAST/NORTHWOOD CLUB**

SPEAKER: Tom Featherston

TOPIC: Marital Property Character of Property after a Change of Domicile or a Shift in Situs

**FEBRUARY 7: LUNCH/DOUBLETREE HILTON**

SPEAKER: Gary Stolbach

TOPIC: Years Into the Trust Administration: Impactful Tax Planning and Related Trustee Duties

**MARCH 7: LUNCH/NORTHWOOD CLUB**

SPEAKER: Steve Akers

TOPIC: Current Estate Planning Developments

**APRIL 4: BREAKFAST/NORTHWOOD CLUB**

SPEAKER: Mary Ann Mancini

TOPIC: Uses for Life Insurance Beyond Taxes

**MAY 2: BREAKFAST/DOUBLETREE HILTON**

SPEAKER: Christine Wakeman

TOPIC: Estate/Asset Protection Planning for Generation 2 in a Family Business

(Breakfast meetings are 7:30 a.m. – 9:00 a.m. and lunch meetings are Noon - 1:30 p.m.)