THE DALLAS ESTATE PLANNING COUNCIL
P. O. Box 38553, Dallas, Texas 75238-8553 Tel: 214-340-8020
E-mail: dallasepc@yahoo.com Website: www.dallasepc.org

NOON MEETING
THURSDAY, SEPTEMBER 6, 2018
(Lunch served Noon-12:30 p.m.; Program 12:30 – 1: 30 p.m.)

NOTE LOCATION: BUSH INSTITUTE
2943 SMU BOULEVARD, DALLAS
PARKING VALIDATION AVAILABLE FOR THE BUSH CENTER PARKING LOT
BRING YOUR TICKET TO THE MEETING FOR VALIDATION

Parking & Walking Directions to the Bush Institute from the Bush Center Parking Lot:
Cross SMU Boulevard from the Bush parking lot to the Center. Before reaching the fountain, take a right onto a path following the exterior of the building. This path will lead you to a set of stairs that will take you down to the Bush Institute entrance where you will enter and be directed to the correct room.

CLICK ON THIS LINK FOR IMPORTANT PARKING DIRECTIONS:
http://www.bushcenter.org/plan-your-visit/directions-and-parking.html

RESERVATION DEADLINE: WEDNESDAY, AUGUST 29, (5:00 P.M.) (PAYMENT MUST BE IN COUNCIL'S OFFICE)

The Washington Update: An Overview of the Political Environment, Prospective Legislation, and Strategies for Investment and Retirement Planning

ANDY FRIEDMAN

Sponsored by Communities Foundation of Texas and Quest Capital Management

Andy Friedman, an expert in political and legislative affairs, will address a number of matters in his 2018 presentation. He will focus on the portions of the Tax Cuts and Jobs Act of particular importance to business owners, investors, and financial advisors, pointing out which individual situations and economic sectors are likely to fare well, or poorly, under the legislation. He will consider the extent to which Congress will adopt the President's legislative initiatives, and how those initiatives are likely to affect the economy, the markets, industry sectors, and investments. And he will consider how the outcomes of the Mueller investigation and the 2018 elections may alter the administration's ability to implement its far-reaching policies. According to CNBC, Andy Friedman (Founder and Principal of The Washington Update) is "one of the nation's most sought-after speakers on all things political." An expert on political affairs, Andy explains the ever changing, sometimes confusing, and often crazy world of Washington in a straightforward bipartisan manner. He is known for predicting the outcomes of Washington deliberations and providing financial advisors and investors with strategies to consider in light of the changing political landscape. Andy was a senior partner with the law firm of Covington & Burling in Washington, D.C., where he practiced for almost thirty years, serving as head of the tax and corporate groups. He received his bachelor degree as valedictorian from Trinity College in Hartford, Connecticut, and his law degree from the Harvard Law School. Andy also served as tax counsel to Major League Baseball, the National Football League, the National Basketball Association, and the National Hockey League. .Andy appears on CNBC, which refers to him as "Wall Street's Tax Expert" and calls him "one of Washington's savviest political observers." Andy also has appeared on the Larry Kudlow Show, the Fox Business Channel, and POTUS radio, has been profiled in the Washington Post and Research Magazine, and is quoted extensively in publications ranging from the Wall Street Journal to USA Today.

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, 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, 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)

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, 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:

OCTOBER 4: BREAKFAST/NORTHWOOD CLUB
SPEAKER: Vance Maultsby
TOPIC: A Drill Down View of the Next Tax Bill and It's Income Tax Implications
NOVEMBER 1: LUNCH/DOUBLETREE HILTON
SPEAKER: Bryan Clontz
TOPIC: Charitable Giving Trends
DECEMBER 6: LUNCH/DOUBLETREE HILTON
SPEAKER: Hugh Magill
TOPIC: Wealth Transfer Planning: Reimaging 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.)