

The Oklahoma City Community Foundation is pleased to offer Estate Planning 1.5, a free monthly continuing education series through Cannon Financial Institute. The series will provide attorneys, financial planners, CPAs, trust officers and other financial planners with 1.5 hours of continuing education credit as they learn more about updates to tax laws, marketplace trends and current trends affecting wealth management/estate planning professionals.

Topics to be covered in this year-long series are listed below. To learn more about a specific topic, visit occf.org/estateplanningseries.

2013 Dates and Topics:

<p>Jan. 29 Tricks and Traps in Disclaimers Including the Use of Defined Value Clauses</p>	<p>July 16 Special Estate Planning Concerns for the Elderly and Disabled Register online June 19 - July 9.</p>
<p>Feb. 26 Estate Planning in 2013 Location: Downtown Library, 300 Park Ave., Oklahoma City Friends of the Library Room, 4th Floor Register online Feb. 1 - 19.</p>	<p>Aug. 20 Estate Planning Issues for Non-Married Clients Register online July 17 - Aug. 13.</p>
<p>March 19 Vexatious Fiduciary Duty Concerns Register online Feb. 27 - Mar. 12.</p>	<p>Sept. 17 The Annual Exclusion May Be Elusive Register online Aug. 21 - Sept. 10.</p>
<p>April 23 Ethics Traps in Estate Planning and Administration Register online Mar. 20 - April 16.</p>	<p>Oct. 15 Solving Frequently Encountered Problems with Retirement Assets Register online Sept. 18 - Oct. 8.</p>
<p>May 21 Never a Dull Moment in the Management of Trust Assets Register online April 16 - May 14.</p>	<p>Nov. 12 Navigating the Charitable Giving Labyrinth Register online Oct. 16 - Nov. 5.</p>
<p>June 18 Business Succession or Business Cessation? Passing the Baton to the Next Generation Register online May 15 - June 11.</p>	<p>Dec. 10 Reaching the Ethical Summit Register online Nov. 13 - Dec. 3.</p>

Speaker: Charles A. Redd, partner in the firm of Stinson Morrison Hecker LLP, concentrates his practice in estate planning, estate and trust administration and estate and trust-related litigation.

Time: 11:30 a.m. – 1:30 p.m.

Lunch will be available from 11:30 a.m. - noon.
Teleconference will begin promptly at noon.

Location: With the exception of the Feb. 26 teleconference, all teleconferences will take place at the Oklahoma City Community Foundation located at 1000 N. Broadway Ave., Oklahoma City, OK.

Cost: There is no charge for the series. Lunch will be provided.

CE: Each teleconference provides 1.5 hours of continuing education credits for CPAs, CFPs, CTFAs, CWSs, CLEs, AFIMs, CLUs, ChFCs and attorneys. Cannon will report attendance for attorneys and CFPs only. All other attendees will be presented with a CE certificate to self-report attendance to the appropriate crediting organizations.

How to Register: Online registration are listed in the calendar above. Registration is first-come, first-served as limited seating is available. Registration deadlines are one week prior to each teleconference. **Register online at www.occf.org/epl5registration.** You may also register by calling Jana Steelman at 405/606-2922. Use any smartphone barcode reader to scan the QR code at right for more information.

Questions? Contact Joe Carter at 405/606-2914 or j.carter@occf.org or visit www.occf.org/estateplanningseries.

