



2017 CANNON Estate Planning LUNCH & LEARN

Save the date for the 2017 Estate Planning Lunch & Learn series! The monthly education series from the Cannon Financial Institute is offered free by the Oklahoma City Community Foundation and provides attorneys, financial planners, CPAs, trust officers and other estate planning professionals an opportunity to connect and collaborate about current wealth management and estate planning topics, while earning continuing education credits.

Continuing Education: Each session provides 1.5 hours of CE credit for CPAs, CFPs, CTFAs, CWSs, CLEs, AFIMs, CLUs, ChFCs and attorneys.

Time: Lunch available at 11:30 a.m. Each session begins at 12 p.m.

Location: Oklahoma City Community Foundation, 1000 N. Broadway Ave., Oklahoma City

Cost: FREE, must register to attend.

To Register: Visit occf.org/ceopportunities. Please update your contact information to be notified about future opportunities.

Questions: Contact Joe Carter at j.carter@occf.org or 405/606-2914.

Save the Date!

Jan. 24: *Elephant in the Room: Disposition of Qualified Plans and IRAs*

Feb. 21: *Post-Mortem Tax Election Heaven*

March 21: *Designing and Administering Trust Distribution Mechanisms*

April 25: *Designing and Administering Estate Plans to Minimize Income Tax*

May 23: *The Junction of Excellent Estate Planning and Terrible Trust Administration*

June 27: *Malpractice in Estate Planning: Some Guidance on How to Avoid It*

July 25: *Estate Planning for and Administration of Digital Assets*

Aug. 22: *Estate Planning for the 99%*

Sept. 19: *Family Business Succession Planning: Now More Challenging Than Ever*

Oct. 17: *Don't Overlook the Power of Powers*

Nov. 7: *Protecting Beneficiaries From Themselves and Others*

Dec. 5: *Trying Too Hard to Do Too Much: Ethics Traps For the Good Samaritan*

A Program of the



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1000 N. Broadway, Oklahoma City, OK 73102-5827
P.O. Box 1146 73101-1146



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2017 Cannon Series Dates &
Registration Inside!



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“I appreciate the opportunity to learn about the different estate scenarios presented through the Cannon series. The education helps me in my practice as I am exposed to different client situations that may need different solutions. I also thoroughly enjoy the monthly lunch I get to spend with others in my profession that are also interested in gaining knowledge and keeping up to date with information.”

– Candace Hobbs, CFP

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