

# Annual Continuing Education Seminar

Presented by :



**MEDINA COUNTY**  
ESTATE PLANNING COUNCIL

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## Topics & Speakers

### Charitable Remainder Trusts: Fundamentals & Strategies

**James Lanham** *Attorney*, Critchfield, Critchfield & Johnston, Ltd.

**Roger Proper Jr.** *Attorney*, Critchfield, Critchfield & Johnston, Ltd.

Jim and Roger will review Charitable Remainder Annuity Trusts as well as Charitable Remainder Unitrusts. They will discuss the basic fundamentals of each, advantages and disadvantages, as well as different planning techniques.

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### 2020: A Year to Remember

**Dan Griffith** *Director of Wealth Strategy*, Huntington Private Bank

**Stephanie Kormanec, J.D.** *VP and Wealth Strategist*, Huntington Private Bank

Dan and Stephanie will review the changes to IRAs and other retirement plans in 2020. The session will also cover techniques that can be utilized in light of the legislative changes, as well as planning techniques that benefit from the current low interest rates and high transfer tax exemptions.



**Friday, October 16th 2020**

**8:30 am - 12:00 pm**



CE Credits Pending  
(3 hours)



Weymouth Country Club  
3946 Weymouth Rd.  
Medina, OH 44256

**RSVP by October 12th**

**To:** Meredith Demczyk



mdemczyk@dla-team.com



330-350-5415



\$100 Fee for Non-Members  
MCEPC Members Free



<https://www.medinacountyepc.org/events/event/18951>