May 14, 2015 Meeting

The next regular program for the Knoxville Estate Planning Council will be held on Thursday, May 14, 2015, at Calhoun's on the River.

Meet and greet 5:15 PM | Dinner: 5:45 PM | Presentation: 6:00 PM

Please note the meeting date has been moved up from the regular 3rd Thursday of the month to accommodate schedules for graduations and Memorial Day Weekend

Review of the Past Year's Significant, Curious or Downright Fascinating Fiduciary Cases

Speaker: Dana Fitzsimons - Principal, Fiduciary Counsel, Bessemer Trust

Recent cases from across the country will be reviewed to assist fiduciaries and their advisors in identifying and managing contemporary fiduciary challenges, including: investments, business interests in trusts, disclosure and privileges, surcharge and defenses, trust modification, and more.

Course Objective: Participants will understand trends in recent cases concerning the fiduciary duties of trustees.

Dana Fitzsimons, Jr. is a Principal and Fiduciary Counsel with Bessemer Trust in Atlanta, Georgia. Prior to joining Bessemer Trust in 2012, Mr. Fitzsimons was a partner with McGuireWoods LLP, where he practiced in the areas of fiduciary litigation, estate planning, and fiduciary risk management. Mr. Fitzsimons is a fellow of the American College of Trust and Estate Counsel, where he serves on the Business Planning, Fiduciary Litigation, and New Fellows Steering Committees, and was recognized in *Chambers USA: America's Leading Lawyers for Business*. He is a member of the American Bar Association Real Property, Trust and Estate Law Section, has served in its committee leadership, and is a Section member of the National Conference of Lawyers and Corporate Fiduciaries. He has also served on the trusts and estates legislative committees in both Virginia and Georgia. Mr. Fitzsimons has contributed articles to numerous publications including the *ACTEC Journal, Probate and Property, Trusts & Estates, Estate Planning, Trusts & Investments*, and the *Leimberg Services Newsletters*. He is a frequent lecturer across the country on fiduciary topics, including presentations to the Heckerling Institute on Estate Planning, the Southern Federal Tax Institute, the Midwest/Midsouth Estate Planning Institute, the ALI-ABA Advanced Estate Planning seminar, the University of Texas Tax Institute, the American Bankers Association Wealth Management and Trust Conference and national teleconferences, the Trust Advisors Forum at Pinehurst, and the Catholic Charities of Chicago Seminar. Mr. Fitzsimons has been quoted in publications such as *The New York Times, The Wall Street Journal*, and *Forbes*. Mr. Fitzsimons received his J.D. from William & Mary Law School, where he was a member of the law review and graduated Order of the Coif. He obtained his Bachelor's degree in music from Ithaca College School of Music and continues to perform as a jazz drummer.

A copy of the handout of the presentation is attached to the meeting notice. Please print and bring a copy if you would like a copy for reference at the meeting.

Bring a Guest Night

Attention Members! The May meeting gives you an opportunity to invite a guest for FREE. KEPC is always looking for new members in the attorney, CPA, Financial, and Special categories. If you know someone who would be interested in becoming a member and would like to attend a meeting, now is the perfect opportunity. There will be 15 slots available for guests and will be filled on a first-come basis. ***Guests are limited to one per member.***

Board Member Elections

KEPC will be voting on next year's officers and board members at this month's meeting. The proposed new board will consist of the following members: President – Stacy Roettger; VP – Renee Harwell; Secretary — Joel Roettger; Treasurer – Charles Farmer; At-Large Director – Angelia Nystrom; At-Large Director – Andy Hampson; At-Large Director— Susan Foard; At-Large Director— Victoria Tillman; Past President — Conrad Slate. Nancy Hertwig is proposed as the new board member to replace out-going board member Conrad Slate. If you would like to nominate another member for consideration at the next meeting, please contact one of the board members.

Please RSVP no later than 12:00 PM Monday, May 11, 2015. Reservations taken after May 11, 2015, will **NOT** include dinner. If a reservation needs to be canceled, notification must be sent no later than 12:00 PM Monday, May 11, 2015, or the member will be billed $25 for the cost of the dinner. Guests are welcome to attend the meeting with a member. There is a $25 charge for guests, $10 for students and emeritus members. If a guest reservation needs to be canceled, notification must be sent no later than 12:00 PM Monday, May 11, 2015, or the member is responsible for the $25 or $10 charge. To register for this course, go to kepctn.org, or call 865-474-7360.

Knoxville Estate Planning Council next meeting scheduled for September 17, 2015

Delivery Method: Group Live
Program Level: Basic
Prerequisites: None
Advanced Preparation: None
CLE Credit: 1 hour General
CLU Credit: 1 hour General
CPE Credit: 1 hour Tax

Due to this program being presented free of charge, there will be no refunds issued. For more information regarding refund, complaint and program cancellation policies, please contact our offices at 865-474-7360.

Knoxville Estate Planning Council is a registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org

Knoxville Estate Planning Council

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