

2013-2014 Calendar of Events

Date	Event	Topic	Speaker	Materials
10/7/2013	Dinner	"Arizona Update 2013" - Arizona Legislation of Interest - Corrections & Clean Up	Roger Curley, : Curley & Allison, LLP Ed Zollars, CPA: Thomas, Zollars & Lynch	10/2013
11/4/2013	Dinner	Business Succession Planning	John H. Brown: Business Enterprise Institute	11/2013
12/2/2013	Special Event	Holiday Bash with Members and Their Guest		
1/13/2014	Dinner	Property Settlement in Divorce	Beverly Brautigam, CPA: Brautigam & Co. Hal D. Bartholomew, Esq.: Bartholomew & Wasznicky, LLP	01/2014
2/3/2014	½ Day Seminar	IRA at Death & Beyond	Robert S. Keebler, CPA, MST, AEP: Keebler & Associates, LLP	02/2014
3/3/2014	Dinner	Ethics – Several Disciplines	J. Scott Rhodes, Esq.: Jennings, Strauss & Salmon	03/2014
4/21/2014	Special Event	Golf Outing and Banquet		
5/12/2014	Dinner	New Life Insurance Products: Annuities & Estate Planning	Carrie Hall, CLU, CFP: Carrie Hall & Associates Don Sweet, JD, CLU: New York Life Insurance Co.	05/2014

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10/1/2012	Dinner	The Art of Donating Your Cake To Your Family and Eating It Too: Current Gift Planning Opportunities Using Strings That Are Not Considered Attached By the Donor	Stacy Eastland Goldman, Sachs & Company	10/2012
11/5/2012	Dinner	Laws, Rules, and Reason: Changes in the Probate Court	Commissioner Richard L. Nothwehr: Maricopa County Superior Court Craig Wisnom: Certified Specialist in Estate & Trust Law	11/2012
12/3/2012	Special Event	Holiday Bash with Members and Their Guest	Monty Aidem Popular Frank Sinatra Lookalike & Sound-Alike Tribute	12/2012

01/07/2013	Dinner	IRA, Retirement Plans and Tax Strategies	Robert S. Keebler Keebler & Associates, LLP	1/2013
2/4/2013	½ Day Seminar	Changes In the Estate Planning Practice and Estate Tax Update	Jonathan G. Blattmachr Eagle River Advisors	2/2103
3/4/2013	Dinner	Insurance and Estate Planning	Vincent M. D'Addona Strategies for Wealth	3/2013
4/25/2013	Special Event	Golf Outing & Banquet		
5/6/2013	Dinner	Asset Protection Advanced Update	Jay D. Adkisson Riser Adkisson LLP	5/2013