
Presenters

Justin Linscott, P.A., C.F.P., C.G.M.A., C.I.T.P. has been with Holbrook & Manter since 2006, focusing on the areas of tax and audit. He serves as an instructor for a nationally recognized CPA review course and was in the Business First Forty Under 40 Class of 2016. Justin frequently travels to Washington D.C. to interact with Congressmen and legislative aids in regards to tax related matters.

Julie Owens, RICP and financial services professional with Eagle Strategies LLC and New York Life, is a Union County resident, wife, mother, and active member of her church and community.

Tara R. Price, J.D., is an associate of Haynes Kessler Myers & Postalakis. Tara has been involved with family law for ten years. Tara's undergraduate degree was from BGSU followed by her J.D. from the University of Toledo. She resides in Columbus with her husband, son, and two dogs, and is active in the dog rescue community.

Brian Ravencraft, C.P.A., C.G.M.A. has been with Holbrook & Manter since 1995, focusing on the areas of tax consulting and management advisory services within agri-business, construction, manufacturing, professional services, real estate and closely held businesses and their owners. Brian has served as President of Union County Board of Developmental Disabilities, Treasurer of the Union County Agriculture Association, and is a past member of Ohio Society of CPAs Legislative Committee.

Honorable Rick Rodger is a Capital University Law School Juris Doctor. He received a Bachelor of Science from Brigham Young University. Rick has worked with the Union County Prosecutor's Office from 2005-2020, coupled with private law practice from 2001-2014. Married for 36+ years, Rick is a Union County resident and active in his church and community.

James R. Vandre, RICP® Financial Advisor with Eagle Strategies LLC and New York Life, has also served as the Chairman of the Planned Gifts Committee with Memorial Hospital's former Development Council and is a Union County Foundation officer and trustee.

Union County Foundation
126 N. Main St., P.O. Box 608
Marysville, OH 43040



Continuing Education Seminar

2021 ESTATE, FINANCE & TAX PLANNING

*A Free CE Seminar for
Professional Advisors*

Sponsored by:
Memorial Health Foundation,
The Union County Foundation, and
The Union County Bar Association

Thursday, October 14

Union County Services Center
940 London Ave.
Marysville, OH 43040

Agenda

Thursday, October 14, 2021

12:00–12:45 p.m.

Registration and Complimentary Lunch

12:45–1:45 p.m.

Comprehensive 2021 Tax Update
Presented by CPAs Brian Ravenscraft and Justin Linscott of Holbrook and Manter CPAs

1:45–2:15 p.m. (Part 1)

Probate - Virtual Notaries and Alternative to Full Estate Administration
Presented by Tara R. Price Esq. of Haynes Kessler Myers & Postalakis

2:15–2:30 p.m.

Break

2:30–3:00 p.m. (Part 2)

Probate - Probate Court Update
Presented by the Honorable Rick Rodger, Union County Probate & Juvenile Court Judge

3:00–4:00 p.m.

In-Depth Look at IRAs Focusing on Distributions to a Variety of Beneficiaries (Secure Act of 2019)
Presented by James R. Vandre RICP® Financial Advisor and Julia Owens, RICP® Financial Services Professional with Eagle Strategies LLC

4:00 p.m.

Adjourn



Please return your completed registration form to:

Union County Bar Association CLE Committee
ATTN: Ross Gillespie
5650 Blazer Pkwy.
Dublin, OH 43017

The deadline for registration is October 1, 2021.

This activity is scheduled for approval by the Ohio Supreme Court Commission on Continuing Legal Education for **3.00 total CLE credit hours**, including 180 minutes in General Hours; 0.0 minutes in Ethics; 0.0 minutes in Substance Abuse Education; and 0.0 minutes in Professionalism. Also approved for 3.00 hours of Continuing Education accreditation for insurance, accounting professionals, and CFPs.

For information or questions, please contact Ross Gillespie at (614) 734-8416, or email rg@gillespielawohio.com.

Registration Form

Please return completed registration form below. **The deadline for registration is October 1, 2021.** Advanced registration is advised for meal planning. However, guests will be admitted at the door, as space permits, but lunches cannot be guaranteed.

Name

Name of company

Address

City

Zip

State

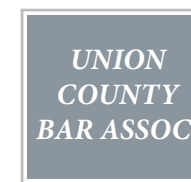
Phone number

Email

Supreme Court Number (if applicable)

Will you be joining us for the complimentary light lunch?

Yes No



Please fill out this form in its entirety and mail to: Union County Bar Association CLE Committee, ATTN: Ross Gillespie, 5650 Blazer Pkwy., Dublin, Ohio 43017