THURSDAY, NOVEMBER 2, 2023

8:00-8:15am  Welcome: Diana Seward, Committee Member and Terra V. Winter, PhD, President and CEO, CFSNM
8:15-9:15am  Presentation 1: TBA
9:15-10:15am Presentation 2: Dr. Gerry Beyer - Electronic Will, ChatGPT, and Other Technologies - Impact on Today’s Estate Planner
10:15-10:30am BREAK
10:30-11:30am Presentation 3: Presentation 6: Dr. Gerry Beyer - Avoiding the Estate Planning “Blue Screen of Death” with Competent and Ethical Practices
11:30-12:30pm Network Luncheon
12:30-1:30pm  Presentation 4: Ann Taylor - Trust Account
1:30-2:30pm  Presentation 5: Jane Gagne - Ethics
2:30-2:45pm BREAK
2:45-3:45pm  Presentation 8: Bridget Mullins - TBA
3:45-4:45pm  Presentation 7: TBA
4:45-5:00pm  Closing Remarks: Patrick Grooms thanks

FRIDAY, NOVEMBER 3, 2023

8:00-8:15am  Welcome: Josh Dwyer, Committee Member
8:15-9:15am  Presentation 8: Vickie Wilcox- Corporate Transparency Act
9:15-9:30am BREAK
9:30-11:00am Presentation 9: TBA
11:00-12:00pm Presentation 10: Feliz Martone - TBA
12:00-1:00pm Network Luncheon
1:00-2:00pm Presentation 11: Ken Leach - Designing a trust to be the beneficiary of IRA, 401k and other retirement benefits under the Secure Act and the proposed regulations.
2:00-2:15pm BREAK
2:15-3:15pm  Presentation 12: TBA
3:15-4:15pm  Presentation 13: TBA
4:15-4:30pm Closing Remarks by Terra Winter