

18th Annual Accountant's Seminar

Thursday, November 12, 2015
Harre Union – Rooms A/B
Valparaiso University – 1509 Chapel Dr.; Valparaiso, IN 46383

AGENDA

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| 7:45 a.m. - 8:30 a.m. | Registration
<i>(Continental Breakfast)</i> |
| 8:30 a.m. | Welcome |
| 8:30 a.m. – 9:20 a.m. | TRUST & ESTATE PLANNING UPDATE
<i>Keith Wolak</i> |
| 9:20 a.m. – 10:05 a.m. | QUALIFICATIONS TO TAX EXEMPTION OF REAL & PERSONAL PROPERTY
<i>Gerold L. Stout</i> |
| 10:05 a.m. - 10:20 a.m. | BREAK |
| 10:20 a.m. – 11:50 a.m. | HEALTH CARE – Update and Audits
<i>Guest Speaker: Matt Glaros</i> |
| 11:50 a.m. – 12:40 p.m. | BUFFET LUNCH |
| 12:40 p.m. – 1:20 p.m. | LEGISLATIVE AND ECONOMIC UPDATE
<i>Guest Speaker: State Representative Ed Soliday</i> |
| 1:20 p.m. – 2:10 p.m. | ETHICS
<i>Guest Speaker: Adam Gwaltney</i> |
| 2:10 p.m. – 2:50 p.m. | RAPID FIRE
<i>Keith Wolak</i> |
| 2:50 p.m. – 3:25 p.m. | CRITICAL CHANGES AFFECTING HOMEOWNERS & CONDO ASSOCIATIONS
<i>Todd A. Leeth</i> |
| 3:25 p.m. - 3:40 p.m. | BREAK |
| 3:40 p.m. – 4:30 p.m. | EMPLOYMENT LAW UPDATE
<i>James Jorgensen</i> |

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REGISTRATION

Please complete this form and return it by either clicking the "SUBMIT" button,
emailing to: regaccountants@hwelaw.com or faxing to 219.465.0603.

Due: Friday, October 23, 2015

Hoepfner Wagner & Evans LLP 18th Annual Accountant's Seminar November 12, 2015

Name					
Company					
Street					
City		State		ZIP	
Phone					
Fax					
Email:					
	(to confirm Registration AND receive materials)				
CPA Number					

REGISTRATION FEE: NONE
CPE CREDITS: 8

A continental breakfast and buffet lunch will be served. Please let us know if you require a special meal:

Please let us know if you require disability assistance:

**PLEASE NOTE: Registration Confirmation and Materials
will be sent via e-mail by November 6.**

Our Speakers

James L. Jorgensen is a partner and head of the Corporate Segment where he practices in the areas of labor, employment, banking and business law. He is a frequent speaker to business groups and an author in business publications.

Todd A. Leeth is a partner and chair of the Real Estate and Land Use Segment. Todd's practice covers purchase, sale and leasing of private and commercial properties, including permits, approvals, special exceptions, tax abatements and zoning.

Keith Wolak, JD CPA is a partner and head of the Wealth & Tax Planning Segment where he focuses his practice in estate and tax matters, counseling clients on minimizing estate taxes, effective transfer of wealth and entity formation. Prior to becoming an attorney, Keith was a staff accountant with Crowe Chizek & Company. Keith is a Board Certified Indiana Trust and Estate Lawyer, as certified by Trust and Estate Specialty Board.

Gerold L. Stout is an associate attorney, focusing his practice on matters involving estate planning, taxation and corporate counseling.

Our Guest Speakers

State Representative Ed Soliday. A former Vietnam Veteran, Representative Soliday had 35 years of employment with United Airlines. Ed served as a pilot, flight manager, senior staff executive, director of safety, and vice president of safety, quality assurance and security. Ed has served on and chaired many government, academic and industry panels. His service has been recognized by NASA, the FAA, the FBI and the Flight Safety Foundation. He has just completed his fifth study committee with the National Academy of Sciences, completing a ten-year review of NASA aeronautics research. Ed currently serves on several non-profit boards of directors including Adler Planetarium, Trinity International University, Emmanuel Hospital Association (USA), and the Flight Safety Foundation. He also serves as an adjunct professor at George Washington University. He is currently employed as an aviation safety consultant.

Matt Glaros, Meyers Glaros Group. Matt began his career as a financial analyst with a Denver-based hedge fund organization. He graduated with a degree in finance and economics from the University of Denver. In 2007, he returned to Northwest Indiana to help run Employer Benefit Systems (EBS). In 2014, EBS joined forces with HIA Insurance to form Meyers Glaros Group. Meyers Glaros Group provides solutions in employee benefits, commercial insurance and personal insurance, reflecting their over 100 years of industry knowledge.

Matt has been recognized with many awards and has spoken about many benefit topics including panel discussions and a presentation at The University of Michigan Ross School of Business regarding effects of healthcare reform. In addition, he sits on the Broker Advisory Committee for Anthem Blue Cross Blue Shield. Matt also serves on several boards, including the Valparaiso YMCA, Legacy Foundation and Campagna Academy. Matt lives in Valparaiso with his wife Kelly and three children. He is an avid golfer and enjoys skiing and running. Matt gets very little sleep.

Adam E. Gwaltney, Ritman & Associates, Inc. Adam is licensed in Property & Casualty insurance and Life & Health insurance and has been licensed for 18 years in Indiana and currently holds licenses in Illinois, Indiana, Kansas, Kentucky, Michigan, Missouri, Ohio, South Carolina, and Tennessee and actively services clients in these states. He specializes in professional liability and cyber liability insurance and is a frequent speaker providing CE through his speaking engagements. He has also contributed a number of articles in the title association, legal and other industries.

Adam is a 30-year veteran of the Boy Scouts of America, serving in local, State and District capacities in various leadership and training positions. He is an avid outdoorsman, a husband to Tana, and a proud father to son Jordan, an Eagle Scout and 2014 graduate of The Citadel.