

03/17/20

## IRS ESTATE AND GIFT TAX EXAMINATIONS IN THE AGE OF HIGHER EXEMPTIONS

JOEL CROUCH

Attendee Last Name	Attendee First Name	Attendee Fee Type	Attendee Designations
Acerra	Guy	Member (Sept. 2019-May 2020)	CFP, CLU
Ahlenius	Erik	Member (Sept. 2019-May 2020)	Attorney, Trust Officer
Alcantar	Corrine	Member (Sept. 2019-May 2020)	
Allums	Tim	Member (Sept. 2019-May 2020)	Realtor
Amen	Henry	Member (Sept. 2019-May 2020)	Attorney
Augsburger	Bob	Member (Sept. 2019-May 2020)	
Ayala	Leslie	Guest Fee	CRE Associate
Aymes	Gary	Member (Sept. 2019-May 2020)	Trust Officer
Baker	James	Member (Sept. 2019-May 2020)	CFA
Balmaceda	Susan	Member (Sept. 2019-May 2020)	Trust Officer
Banks	John	Member (Sept. 2019-May 2020)	Attorney
Bayern	Art	Member (Sept. 2019-May 2020)	Attorney
Bayern	William	Member (Sept. 2019-May 2020)	attorney
Berry	Chris	Guest Fee	
Blair	Whitney	Member (Sept. 2019-May 2020)	CTFA, JD
Bonilla	Monica	Member (Sept. 2019-May 2020)	Attorney
Braulick	Todd	Member (Sept. 2019-May 2020)	JD
Bressler	Stephen	Member (Sept. 2019-May 2020)	Attorney
Brown	Spencer	Member (Sept. 2019-May 2020)	Aging Life Care Professional
Brunello	Daniel	Guest Fee	
Brysacz	Matthew	Member (Sept. 2019-May 2020)	Attorney
Burges	Wayne	Member (Sept. 2019-May 2020)	Attorney/CPA
Burke	Tracey	Member (Sept. 2019-May 2020)	CPA, CFP

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Carlton	Kristin	Member (Sept. 2019-May 2020)	CFP
Carroll	Kalyn	Member (Sept. 2019-May 2020)	CPA
Christie	B. Corbett	Member (Sept. 2019-May 2020)	
Clausen	Steve	Member (Sept. 2019-May 2020)	Attorney
Coggins	Charles	Member (Sept. 2019-May 2020)	CPA
Cornelious Almaraz	Hayley	Guest Fee	
Countryman	Stephen	Member (Sept. 2019-May 2020)	JD
Davis	Sam	Guest Fee	
DeLeon	Jaime	Member (Sept. 2019-May 2020)	CFP
Digby	Darin	Member (Sept. 2019-May 2020)	Attorney, CPA
DOTY	NATHAN	Member (Sept. 2019-May 2020)	
<del>DOTY</del>	<del>NATHAN</del>	<del>Member (Sept. 2019-May 2020)</del>	<del>CWS</del>
Downing	Tess	Member (Sept. 2019-May 2020)	CFP
Edelman	Amelia	Member (Sept. 2019-May 2020)	Attorney
Edwards	Jennifer	Member (Sept. 2019-May 2020)	CPA/CFF, CVA
Enriquez	Mary	Member (Sept. 2019-May 2020)	
Espinosa	Roberto	Member (Sept. 2019-May 2020)	Wealth Management Advisor
Ethridge	Leanne	Member (Sept. 2019-May 2020)	Trust Officer
Ewald	Allen	Member (Sept. 2019-May 2020)	Attorney
<del>Ewald</del>	<del>Allen</del>	<del>Member (Sept. 2019-May 2020)</del>	<del>Attorney / CPA</del>
Ford	Kimberly	Member (Sept. 2019-May 2020)	
Ford	Kimberly	Member (Sept. 2019-May 2020)	CPA, CVA, MAFF
Ford	Jill	Member (Sept. 2019-May 2020)	

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FROEMSDORF	ELINOR	Member (Sept. 2019-May 2020)	CLU, ChFC, AEP
Garcia	Marcelino	Guest Fee	Broker Associate
Garcia III	J Alex	Member (Sept. 2019-May 2020)	Attorney
Gerald	Evan	Member (Sept. 2019-May 2020)	CFP
Gerdes	Charlie	Member (Sept. 2019-May 2020)	
Gill	Alicia	Member (Sept. 2019-May 2020)	CPA
Giltner	Maggie	Member (Sept. 2019-May 2020)	Attorney
Gonzalez	Maira	Member (Sept. 2019-May 2020)	Attorney
Grater	Teryn	Guest Fee	
Guerrero	Lisa	Member (Sept. 2019-May 2020)	Attorney
Guerrero	Ed	Member (Sept. 2019-May 2020)	CPA
Guillemette	Luke	Guest Fee	
Gurwitz	Ben	Member (Sept. 2019-May 2020)	CFP(r)
Hairston	David	Member (Sept. 2019-May 2020)	
Hardaway	Julie	Member (Sept. 2019-May 2020)	Trust Officer
Harris	Stephanie	Member (Sept. 2019-May 2020)	CFP
Hasting	Howard	Member (Sept. 2019-May 2020)	Attorney
Heintzelman	Storey	Member (Sept. 2019-May 2020)	Attorney
Henk	Denise	Member (Sept. 2019-May 2020)	CWS
Hernandez	Anais	Member (Sept. 2019-May 2020)	A.V.P & Trust Officer
Hetrick	Elizabeth	Member (Sept. 2019-May 2020)	JD CTFA
Hughes	Shawn	Member (Sept. 2019-May 2020)	JD
jackson	charles	Member (Sept. 2019-May 2020)	attorney

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Jackson	Jeff	Member (Sept. 2019-May 2020)	
Jarzombek	Tammy	Member (Sept. 2019-May 2020)	CTFA
Johnson	Bruce	Member (Sept. 2019-May 2020)	ASA
Jones	Dave	Member (Sept. 2019-May 2020)	Attorney
Jones	Emory	Member (Sept. 2019-May 2020)	CFP
Kennedy	Kevin	Member (Sept. 2019-May 2020)	Attorney
King	Greg	Member (Sept. 2019-May 2020)	
King	Brit	Member (Sept. 2019-May 2020)	
Klein	Michael	Member (Sept. 2019-May 2020)	ChFC, CLU, CRPC, AAMS, CWS
Kreager	Mike	Member (Sept. 2019-May 2020)	Attorney
Kveton	Monica	Member (Sept. 2019-May 2020)	EA
Lacy	Karen	Member (Sept. 2019-May 2020)	Vice President
Lamon	David	Member (Sept. 2019-May 2020)	Attorney
Landin-Penirelli	Erika	Member (Sept. 2019-May 2020)	
Leach	Jason	Member (Sept. 2019-May 2020)	Attorney
Lopez	Carlos	Member (Sept. 2019-May 2020)	
Lovell	Matthew	Member (Sept. 2019-May 2020)	Attorney
Magoo	Rosiee	Member (Sept. 2019-May 2020)	Attorney
Manzo	Michelle	Guest Fee	
McClellan-Merz	Ellen	Member (Sept. 2019-May 2020)	
McNeil	Carol	Member (Sept. 2019-May 2020)	
Mewborne	Michael	Member (Sept. 2019-May 2020)	Financial Advisor / Attorney
Miller	Lauren	Member (Sept. 2019-May 2020)	Attorney

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Mitchell	Darin	Member (Sept. 2019-May 2020)	JD
Moore	Kevin	Member (Sept. 2019-May 2020)	CFP
Morris	David	Member (Sept. 2019-May 2020)	attorney
Netting IV	Conrad	Member (Sept. 2019-May 2020)	CPA
Netting, V	Conrad	Member (Sept. 2019-May 2020)	J.D.
Norton	Julie	Member (Sept. 2019-May 2020)	CPA, Retired
Nourie	Kimberly	Member (Sept. 2019-May 2020)	CPA, CFP
Occhipinti	Matthew	Member (Sept. 2019-May 2020)	CLU, ChFC, CFP, AEP
Oliver	Jim	Member (Sept. 2019-May 2020)	CPA, CFP
Oxford	Brad	Member (Sept. 2019-May 2020)	Attorney
Pape	Patrick J.	Membership Fee - New Members/Renewals (Sept. 2019- May 2020)	Attorney
PARENTI	PETER	Member (Sept. 2019-May 2020)	Attorney
Park	Jim	Member (Sept. 2019-May 2020)	ASA
Peace	Tyler	Member (Sept. 2019-May 2020)	Attorney
Polansky	Edward	Member (Sept. 2019-May 2020)	CPA/PFS
Ramsey	Amber	Member (Sept. 2019-May 2020)	Attorney
Reid	Eric	Member (Sept. 2019-May 2020)	CFP
Ressmann-Gray	Ashley	Member (Sept. 2019-May 2020)	Attorney
Ritter	Cathy	Member (Sept. 2019-May 2020)	
Rodriguez	Lorena	Member (Sept. 2019-May 2020)	Administrative Officer
Rogers	John	Member (Sept. 2019-May 2020)	CWS, CTFA
Rogers	Marcus	Member (Sept. 2019-May 2020)	Attorney

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Roos	Marty	Member (Sept. 2019-May 2020)	Attorney
Rowe	Mary	Member (Sept. 2019-May 2020)	
Rubsamen	Rollins	Member (Sept. 2019-May 2020)	QPFC
Samas	Mark	Member (Sept. 2019-May 2020)	CPA
Scheuerman	Hella	Member (Sept. 2019-May 2020)	Attorney
Schmidt	Ronald	Member (Sept. 2019-May 2020)	Attorney
Schwartz	Sol	Member (Sept. 2019-May 2020)	
Sciano	Daniel	Membership Fee - New Members/Renewals (Sept. 2019-May 2020)	
Seitz	Casey	Member (Sept. 2019-May 2020)	
Shipp	Mo	Member (Sept. 2019-May 2020)	Attorney
Shirley	Sharon	Member (Sept. 2019-May 2020)	Sr. Vice President
Smith	Mark	Member (Sept. 2019-May 2020)	attorney
Smith	Andrew	Member (Sept. 2019-May 2020)	attorney
Smith	Carolyn	Member (Sept. 2019-May 2020)	CPA, AEP, CAP
Soat	Richard	Member (Sept. 2019-May 2020)	CPA
Solcher	Whitney	Member (Sept. 2019-May 2020)	CFA
standley	mason	Member (Sept. 2019-May 2020)	Attorney
standley	mason	Member (Sept. 2019-May 2020)	attorney
Strait	Elizabeth	Member (Sept. 2019-May 2020)	Attorney
Thomas	Nancy	Guest Fee	
Thompson	Jeffrey	Member (Sept. 2019-May 2020)	
Tottenham	Candace	Member (Sept. 2019-May 2020)	CFIRS

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Trimble	Tom	Member (Sept. 2019-May 2020)	CPA
Trowsdale	Helen	Member (Sept. 2019-May 2020)	Nurse
Tye	Richard	Member (Sept. 2019-May 2020)	Attorney
Velasco	J. Miguel	Member (Sept. 2019-May 2020)	Executive Partner
Voeller	Jim	Member (Sept. 2019-May 2020)	Attorney
Vogt	Robert	Membership Fee - New Members/Renewals (Sept. 2019-May 2020)	Appraiser
Walker	Marvin	Member (Sept. 2019-May 2020)	CLU, ChFC
WALKER	OLGA	Member (Sept. 2019-May 2020)	ASSISTANT
Wallace	Margaret	Member (Sept. 2019-May 2020)	CPA
Wallis III	Ben	Member (Sept. 2019-May 2020)	Attorney
Warren	Mike	Member (Sept. 2019-May 2020)	Attorney
Webb	Heather	Member (Sept. 2019-May 2020)	JD, CPA, Trust Officer
Weilbacher	Bruce	Member (Sept. 2019-May 2020)	CPA
Weilbacher	Kim	Member (Sept. 2019-May 2020)	CPA
Weisinger	Charles	Member (Sept. 2019-May 2020)	Attorney, AEP
Werner	Carl	Member (Sept. 2019-May 2020)	Attorney
West	David	Member (Sept. 2019-May 2020)	Attorney
White	David	Member (Sept. 2019-May 2020)	Attorney/CPA
Whitten	Lacey	Member (Sept. 2019-May 2020)	Attorney
Wiesner	Susan	Member (Sept. 2019-May 2020)	CTFA AEP
Wiggans	Melissa	Member (Sept. 2019-May 2020)	Broker
Wilkes	Michael	Member (Sept. 2019-May 2020)	Attorney

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Winborn	Dawn	Member (Sept. 2019-May 2020)	CIC
Winslow	Reagan	Member (Sept. 2019-May 2020)	Trust
Wnuk	Todd	Member (Sept. 2019-May 2020)	CFP
Wolff III	Harry W.	Member (Sept. 2019-May 2020)	Attorney
Wood	Dorothy	Member (Sept. 2019-May 2020)	CFP
Wood	Michelle	Member (Sept. 2019-May 2020)	AAMS
Wyckoff	Polly	Member (Sept. 2019-May 2020)	CPA
Zajac	Daniel	Member (Sept. 2019-May 2020)	