Atrium Medical Center FOUNDATION | Good Samaritan Foundation-Dayton | Miami Valley Hospital Foundation | Upper Valley Medical Center FOUNDATION

28th Annual Estate & Tax Planning Professional Seminar
Friday, October 30, 2026
at the Savannah Center in West Chester, Ohio

Presenting Sponsor
Wells Fargo Advisors

Session Sponsors
Clark Schaefer Hackett *Johnson Investment Counsel* *Katz Teller* *Northwestern Mutual*

Breakfast Sponsor
Park National Bank

Lunch Sponsor
LCNB Wealth

Break Sponsors
Thompson Hine
OhioLocalTax.com

Time	Schedule	Agenda			
	7:30 am	***Registration & Breakfast***			
	8:20 am	***Welcome*** Kevin Harlan, President, Atrium Medical Center & Upper Valley Medical Center Mike Stautberg, President, Atrium Medical Center Foundation & System VP of Planned Giving, Premier Health			
1.5 hours	8:30 - 10:00 am	***Alternative Investments*** Patrick Quinlivan			
(10 min)	*10:00 - 10:10 am*	***Break with Vendor & Health Fair***			
1 hour	10:10 - 11:10 am	***Planning Beyond Ownership: Marriage, Succession, and Executive Retention*** Garra E. Brown Bartley, JD; Margaret C. Gibson, JD & Wijdan Jreisat, JD			
(10 min)	11:10 - 11:20 am	***Break with Vendor & Health Fair***			
1 hour	11:20 am - 12:20 pm	***Year-end Tax Update*** Mark H. Gaudet, CPA, CFP, CAP			
(50 min.)	*12:20 - 1:10 pm*	***Lunch Break with Vendor & Health Fair*** Jenny Lewis, MBA, CFRE, System VP of Philanthropy, Premier Health			
		Track I	**Track II**	**Track III**	**Track IV**
1 hour	1:10 - 2:10 pm	***Cyber Security*** Justin Ellerman	***Long Term Care*** Kara Byrnside, M.A. CCC-SLP	***Attorneys only*** ***Professionalism*** George D. Jonson, JD Lisa M Zaring, JD	***CPAs only*** ***CPA Ethics in the Real World*** Toby Groves *CPA Ethics Part I of III*
(10 min)	*2:10 - 2:20 pm*	*Break with Vendor & Health Fair*			
1 hour	2:20 - 3:20 pm	***The Opportunity When Planning Between The Pieces*** Michael D Allen, CFP, CAP, RICP	***Medicaid Law*** Ralph J. Conrad, JD	***Attorneys only*** ***Ethics—A Code of Professional Responsibility*** George D. Jonson, JD Lisa M Zaring, JD	***CPA Ethics Part II of III*** Must attend all three sessions all afternoon
(10 min)	*3:20 - 3:30 pm*	*Break with Vendor & Health Fair*			
1 hour	3:30 - 4:30 pm	***Economic & Market Outlook*** *Landon Peterson CFA®* Johnson Investment	***Social Security Update*** Kelly Draggoo	***Attorneys Track*** ***Substance Abuse & Mental Health Awareness*** Emily Cross, MSW, LISW *30 minutes presentation for a total of 6.0 CLE*	***CPA Ethics Part III of III*** *2027 will be CFP ethics for financial planners*
6.0 - 6.5	*4:30 pm*	*Closing & Continuing Education Procedures*			

Tracks I & II are open to all attendees (attorneys, accountants, financial planners, insurance agents, and trust officers)
Track III is for legal professionalism credits
Track IV is accounting ethics credit.
In 2027, CFP Ethics will be offered in Track IV and then 2028 will alternate to CPA Ethics.

Atrium Medical Center FOUNDATION | Good Samaritan Foundation-Dayton | Miami Valley Hospital Foundation | Upper Valley Medical Center FOUNDATION

About Our Speakers

Michael D. Allen, CFP, CAP, RICP
Northwestern Mutual
Platt Allen
431 E Third Street, Suite 120
Dayton OH 45402

Michael D. Allen, CFP, CAP, RICP, started his career with Northwestern Mutual's internship program before taking on his current role as Co-Founder and President of Platt Allen. With over a decade of experience, his calming and systematic approach helps clients with life transitions. Michael earned his BS from The Ohio State University with specialization in Finance and Investments.

Garra E Brown Bartley, JD
Katz Teller
255 East Fifth Street, Suite 2400
Cincinnati, Ohio 45202-4787
513-977-3438

Garra E. Brown Bartley, JD, is an attorney with Katz Teller and advises employers, plan sponsors, and fiduciaries on employee benefits and executive compensation matters under ERISA, the Internal Revenue Code, and related federal regulations. She also assists clients with the design, implementation, and administration of equity and cash-based incentive arrangements, bonus programs, and non-qualified compensation structures. She provides practical guidance to employers on related complex tax and regulatory issues, including matters arising under Sections 280G and 409A, helps organizations develop thoughtful and creative approaches to retaining employees, while staying aligned with business goals and legal requirements. Garra earned her JD from Wake Forest University School of Law and undergrad from Warner Unversity.

Kara Byrnside, MA, CCC-SLP
Oasis Senior Advisors
513-476-7012

Kara Byrnside, M.A. CCC-SLP, is a Speech Language Pathologist (SLP) of 27 years who has worked in geriatric healthcare for most of her career. Kara has worked as a clinical liaison, clinical specialist and educator in skilled healthcare including independent living, assisted living, memory care and community homes, and in non-medical home care. She is a master clinician in cognition; a Certified Dementia Practitioner, trained by Teepa Snow in her Personal Approach to Care; former certified Dementia Capable Care Specialist; and trainer. Kara is a graduate of Bowling Green State University with a master's degree in Communication Disorders.

Ralph J. Conrad, JD
The Conrad Law Office
33 Donald Drive, Suite 9
Fairfield, Ohio 45014
513-236-8338

Ralph J. Conrad, JD, has nearly 40 years of experience advising business and individual clients in the areas of tax planning, estate planning, and Medicaid planning. He earned his BS degree from Ohio Northern University, majoring in accounting, and his JD and Master of Tax degrees from The University of Akron. Ralph is Chair of the Cincinnati Bar Association Elder Law Committee, a member of the Board of Trustees of ProSeniors, Inc., and member of the American, Ohio State and Cincinnati Bar Associations.

Emily Cross, MSW, LISW
Atrium Medical Center
Behavior Health Unit
One Medical Center Drive
Middletown OH 45005

Emily Cross, MSW, LISW, is a licensed independent social worker with a focus on providing compassionate, patient-centered support. Emily is board certified by the State of Ohio Counselor, Social Worker, and Marriage and Family Therapist Board. She has a special interest in gerontology and is passionate about supporting older adults and their families through life transitions, care planning, and access to resources. She earned her Master of Social Work from Miami University and holds dual bachelor's degrees in Social Work and Gerontology from Bowling Green State University.

Kelly S. Draggoo
Social Security Administration
550 Main Street, Room 2000
Cincinnati, Ohio 45202
513-357-5507

Kelly S. Draggoo began her career with Social Security Administration in 2009 as an SSI Claims Specialist in Cincinnati. She has been cross trained in most programs at Social Security including retirement, disability, survivor and SSI. Kelly is a graduate of the University of Cincinnati and holds a bachelor's degree in psychology.

Atrium Medical Center FOUNDATION | Good Samaritan Foundation-Dayton | Miami Valley Hospital Foundation | Upper Valley Medical Center FOUNDATION

About Our Speakers

Justin Ellerman
Wells Fargo
Chicago, Illinois

Justin Ellerman joined Wells Fargo in 2019 and has almost 20 years of experience in cybersecurity, incident response, and privacy within the financial services industry. Justin and his team support the cybersecurity needs of clients and customers by helping them navigate the evolving cyber threat landscape through industry best practices. He has led numerous speaking engagements at industry conferences and for Wells Fargo clients while partnering with agents from the FBI and U.S. Secret Service. He has also been featured in the "Cybercrime Podcast" focusing on current cyber risks and trends. Prior to joining Wells Fargo, Justin held previous roles at other international financial institutions focusing on cyber incident response, privacy operations, and cybersecurity maturity/strategy. He holds an MBA in Executive Leadership and maintains industry certifications including the CISSP, CIPP/US, GCCC, GCTI and GSTRT.

Mark H. Gaudet, CPA, CFP, CAP
Clark Schaefer Hackett
One East Fourth St, Suite 1200
Cincinnati, Ohio 45202
513-241-1212

Mark H. Gaudet, CPA, CFP, CAP, is a shareholder with Clark Schaefer Hackett and leads the Cincinnati Tax Practice. He advises corporate executives, high-net worth families and closely held businesses and their owners. Mark helps clients related to income tax, transfer tax, philanthropic, and succession planning matters. He earned his BSBA from Miami University and MSBA in Taxation from University of Cincinnati.

Margaret C. Gibson, JD
Katz Teller
255 East Fifth Street, Suite 2400
Cincinnati, Ohio 45202-4787
513-977-3438

Margaret C. Gibson, JD, is an attorney with Katz Teller. Prior to attending law school, Maggie was a fifth-grade teacher. Maggie counsels clients on estate planning, charitable giving, special needs issues, and probate matters. Maggie prepares comprehensive estate plans, facilitates charitable giving, restructures existing estate plans, uses non-judicial settlement agreements, and navigates probate issues. She earned her BA from University of Notre Dame and her masters in Education and JD from Loyola University Chicago.

Toby Groves
Ohio Society of CPAs

Toby Groves is a researcher, advocate, and speaker who investigates the cognitive science of expert judgment. He teaches expert decision-makers to tap hidden cognitive networks that maximize their powers of reasoning. A popular speaker amongst government and professional organizations that provide society's most critical services, Toby is known for delivering unconventional, interactive talks that engage audiences in dramatic live experiments. Trained in a unique combination of behavioral and financial forensics, Toby is a doctoral-level researcher in psychology. He has been featured in media outlets such as NPR, and in numerous professional journals, and is studied by leading researchers and business schools around the world.

George D. Jonson, JD
Montgomery Jonson
36 East Seventh St., Suite 2100
Cincinnati, Ohio 45202
513-768-5220

George D. Jonson, JD, is a partner with Montgomery Jonson and represents individuals and businesses in a wide range of civil litigation. He defends lawyers in professional liability claims; represents attorneys and judges in disciplinary proceedings; and advocates for candidates seeking admission to the Ohio bar in character and fitness proceedings. He represents public and private companies in a variety of matters, including breach of contract, business torts, non-compete litigation, disputes between owners of closely held corporations, and law firm/partner separations. For over 25 years, he has served as a member of the Cincinnati Bar Association's Ethics & Professional Responsibility Committee and Fee Arbitration Committee and speaks regularly on ethics, professional responsibility, and legal malpractice prevention. He earned his BA from Miami University and JD from University of Cincinnati.

About Our Speakers

Wijdan Jreisat, JD
Katz Teller
255 East Fifth Street, Suite 2400
Cincinnati, Ohio 45202-4787
513-977-3438

Wijdan Jreisat, JD, is a an attorney with Katz Teller. She handles clients' family law and employment law needs. She also serves as an advisor to employers in handling their relations with employees. Whether hiring, disciplining or firing, Wijdan assists in setting the tone for that employer's relationships with its employees. Wijdan also serves as an elected member of the firm's Board of Directors and a member of the firm's strategic planning and recruiting committees. She graduated summa cum laude from Centre College and earned her JD from University of Virginia.

Landon J. Peterson, CFA
Johnson Investment Counsel
3777 West Fork Road
Cincinnati, Ohio 45247
513-661-3110

Landon J. Peterson serves as a Portfolio Analyst with Johnson Asset Management in Cincinnati. Prior to joining the firm, Landon held sales & marketing roles with Great American Insurance Group, Nucor Corporation, and Prinsco Inc. He holds the Chartered Financial Analyst designation. Landon is a graduate of Hillsdale College.

Patrick Quinlivan
Blackstone Private Wealth

Patrick Quinlivan is a Principal in Blackstone Private Wealth, working in partnership with financial advisors across New England, upstate New York, western Pennsylvania, and Ohio. He has over 14 years of industry experience covering both private and public markets with much of his career serving the northeast region. Patrick received a BA in Economics and Communications from Boston College.

Lisa M. Zaring, JD
Montgomery Jonson
36 East Seventh St., Suite 2100
Cincinnati, Ohio 45202
513-768-5220

Lisa M. Zaring, JD, is a partner with Montgomery and Jonson, providing ethics advice and responding to disciplinary grievances. She also regularly defends judges and lawyers in cases before the Supreme Court of Ohio's Board of Professional Conduct. She has advocated for law students and out-of-state attorneys seeking admission to the state bar in proceedings before the Board of Commissioners on Character and Fitness. She represents professionals charged with unauthorized practice of law, including real estate agents, accountants, debt collectors, and interpreters, through proceedings before the Board on the Unauthorized Practice of Law. Lisa also defends insurance agents and brokers facing errors and omissions claims, and she defends other licensed professionals, including lawyers and financial advisors, in professional malpractice litigation. She is a graduate of University of Colorado and earned her JD From Golden Gate University School of Law.

Volunteer Planning Committee

28th Annual Estate & Tax Planning Professional Seminar
Friday, October 30, 2026

William Keck, JD, Seminar Chair
Millikin & Fitton
6 South Second Street
Hamilton, Ohio 45011
513-863-6700
keck@mfitton.com

Cori Haper, JD
Thompson Hine
10050 Innovation Drive, Suite 400
Dayton, OH 45342
937-443-6856
cori.haper@thompsonhine.com

Kyle Higgason
Yellow Cardinal
9120 Union Centre Blvd., Suite 200
West Chester, Ohio 45069
Kyle.Higgason@YellowCardinalAdvisors.com

Melissa Kidd, JD
Attorney at Law
Mansfield & Dayton Area
317-601-0260
missykidd2008@yahoo.com

Chad R. Maggard, CFA
Johnson Investment Counsel, Inc.
7755 Montgomery Road, Suite 180
Cincinnati, Ohio 45236
513-389-2767
cmaggard@johnsoninv.com

Peter D. McColgan
Wells Fargo Advisors
8044 Montgomery Road, St 570
Cincinnati, Ohio 45236
513-985-2170
Peter.Mccolgan@wellsfargoadvisors.com

Candice DeClark Peace, JD, CPA
Clark Schaefer Hackett
10100 Innovation Drive, Ste 400
Dayton, Ohio 45342
513-424-5000
cdeclark@cshco.com

Jo Anne Reiling
Community Volunteer
Greater Dayton
joanne@reiling.com

Brittany S. Rieck
Yellow Cardinal Advisory Group
300 High Street, 2nd Floor
Hamilton, OH 45011
513.425.7576
Brittany.Rieck@YellowCardinalAdvisors.com

Seminar Overview

28th Annual Estate & Tax Planning Professional Seminar
Friday, October 30, 2026

Atrium Medical Center Foundation has proudly presented the Estate and Tax Planning Professional Seminar to area advisors every year since 1999. This year's 28th annual seminar will be held on Friday, October 30, 2026, at the Savannah Center in West Chester. In the past, we have been privileged to present a high-quality seminar to professional advisors free of charge, thanks to the generosity of our corporate donors.

The seminar's popularity has soared over the years, solidifying its status as one of the largest educational opportunities in the region. With attendance nearing full capacity at 450 attendees annually, the demand for our seminar continues to grow. Our mailing list currently boasts approximately 1,250 advisors and past attendees. Again this year, we're broadening our reach to include friends from all four Premier Health Foundations: Atrium Medical Center Foundation; Good Samaritan Foundation-Dayton; Miami Valley Hospital Foundation; and Upper Valley Medical Center Foundation. Together, we hope to further strengthen relationships with local attorneys, accountants, financial advisors, insurance agents, and bank trust officers across Southwest Ohio and beyond.

All continuing education provider information will continue to be associated with Atrium Medical Center Foundation.

Should you have any questions, please contact:

Michael D. Stautberg
President, Atrium Medical Center Foundation
VP of Planned Giving, Premier Health
MDStautberg@PremierHealth.com
W 513-974-5125
C 513-658-2821

Jessica Woodard
Development Manager, Atrium Medical Center Foundation
Seminar Coordinator
JAWoodard@premierhealth.com
W 513-974-4509
C 937-430-1100

Dawn G. Hensley
Administrative Assistant, Atrium Medical Center Foundation
Seminar Assistant
513.974.5144
DGHensley@PremierHealth.com