

**ESTATE PLANNING SEMINAR
AGENDA
November 13, 2025**

- 8:00 - 8:10 Welcome: Dr. Damon Kennedy, President, Midland College
- 8:10 - 9:10 “YEAR-END TAX STRATEGIES UNDER THE ONE BIG BEAUTIFUL BILL ACT”**
- Marc Young CPA**
Partner, Tax - Commercial
Weaver
- 9:10 – 9:30 Break*
- 9:30 – 10:30 “DEVELOPMENTS IN LIFE INSURANCE FOR BUY/SELL ARRANGEMENTS IN THE AGE OF CONNELLY”**
- Edmund Perry, JD**
Preston Sartelle, CFA
Rockbridge Group
- 10:30 – 11:30 “AGRICULTURAL TRANSITION & SUCCESSION PLANNING: TIPS, TRICKS, & COMMON TOOLS”**
- Garrett Coutts, Attorney**
Brady & Hamilton, LLP
- 11:30 - 12:30 Lunch Break – Dr. Damon Kennedy, President, Midland College and Stephen Bowerman, President/CEO of Midland Health*
- 12:30 – 1:30 “ESTATE IMPLEMENTATION ISSUES”**
- Jullie Strippoli**
Senior Wealth Advisor, Weaver Capital Advisors
Weaver and Tidwell
- 1:30 – 2:30 “ISSUES THAT MAY ARISE WHEN THIRD PARTIES INTERPRET ANCILLARY DOCUMENTS”**
- Mindi Bozeman Zanowiak, Of Counsel**
Sprouse Shrader Smith PLLC
- 2:30 – 3:00 Break*
- 3:00 - 4:00 “ESTATE PLANNING IN LIGHT OF A DIVORCE”**
- Kimberly N. Loveland, J.D., LL.M.**
Loveland & Hurley, PLLC
- 4:00 – 5:00 “OVERVIEW OF THE 89TH TEXAS LEGISLATURE”**
- Nelson Jarrin, JD**
Meadows Mental Health Policy Institute