

## EAST TEXAS ESTATE PLANNING COUNCIL

**COUNCIL MEETING:** **Wednesday**, February 19, 2020

**WHERE:** Hollytree Country Club

**TIME:** Register and Lunch: 11:30 AM – 12:00 PM  
Program: 12:00 PM – 1:00 PM

**SPEAKER:** Denise Schuh

**TOPIC:** “Donating Complex Assets without Giving Away the Farm”



Denise Schuh is an Executive Director and Wealth & Estate Planning Strategist for Morgan Stanley’s Southern Central region. In collaboration with the firm’s Financial Advisors, Denise provides customized solutions for the comprehensive wealth planning needs of the firm’s ultra-high net worth clients. Denise’s areas of expertise include estate tax planning, sophisticated wealth transfer and trust planning strategies, business succession, asset protection, charitable and income tax planning. Prior to joining the firm in November 2018, Denise’s 24 years of legal and planning experience include positions as Legal Counsel and Managing Director with Schwab Charitable, Trust & Estate/Tax Consultant for Charles Schwab’s high net worth and ultra-high net worth clients, Vice President of Personal Trust, Associated Bank, Vice President and Trust & Estate Advisor for Comerica Bank, Senior Relationship Manager with Fulton Financial Advisors, N.A., and Attorney with the law firms of Hepburn, Willcox, Hamilton & Putnam and Best & Flanagan, LLP.

Denise received her Bachelor of Arts in Political Science from the University of Wisconsin-Madison and her Juris Doctor cum laude from Northern Illinois University, College of Law, where she was Editor-in-Chief of Northern Illinois’ Law Review. Denise was Fellow of the American Bar Association’s Real Property, Probate and Trust Section and a member of the Estate Planning for Business Owners Committee. Denise holds the Accredited Estate Planner® designation and is a member of the State Bars of Texas, Pennsylvania, and Minnesota.

**C. E. CREDIT:** No prerequisites required.

CPAs: One hour  
Attorneys: One hour

CFP: One hour  
CLU: One hour - based on course content

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***Please RSVP by noon on Friday, February 14, 2020.***

***Cancellations must be made prior to 12:00 noon on Tuesday February 18, 2020.***

Please be prepared to pay for your meal at the time of meeting.

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Member(s) Attending: \_\_\_\_\_

If bringing Guests, how many? \_\_\_\_\_

Please provide the names of your guests: \_\_\_\_\_

Buffet Style Lunch – Cost \$20.00 (Due at time of meeting)

**MAIL, PHONE, FAX, OR E-MAIL YOUR REPLY TO:**

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