



36th Annual EBA Estate and Business Planning Institute
Thursday, November 6, 2025 | DoubleTree, Evansville

Attorneys - IN: 6 CLE, 1 Ethics | KY: 6 CLE, 1 Ethics

Indiana CPA: 7.2 CE

Indiana Insurance Professionals: 6 CE

CFP: 6 CE

MORNING SESSIONS

8:00 a.m.	Ballroom A	Registration and Breakfast
8:25 a.m.		Introductions
8:30 a.m.	Ballroom A	Understanding the Power and Purpose of Trust Protectors Marc Fine, Jackson Kelly Justin Johnson, Jackson Kelly Cassie Vivian, Jackson Kelly
9:35 a.m.	Ballroom A	State Lines, Trust Lines: Situs Strategies Mark Samila, Kahn Dees Donovan & Kahn Casey Riggs, Riggs Davie PLC
10:35 a.m.		Break
10:50 a.m.	Ballroom A	Workshop Session I: A. Trust Administration from the Corporate Fiduciary Perspective Bart Brown, German American Wealth Advisory Group Mark Cannon, Fifth Third Bank Brandy Garrett, 1834, A Division of Old National Jackie Russell, Baird Trust Company
	Ballroom A	B. Indiana's Probate and Non-Probate Claims Statutes J. Beau Dial, Dentons Bingham Greenebaum
	Ballroom C	C. Connolly v. Commissioner: Rethinking Life Insurance, Buy-Sell Agreements, and Business Valuation for Estate Tax Planning Ryan Masterson, Kemper CPA Group
11:50 a.m.	Ballroom B	Lunch



AFTERNOON SESSIONS

12:30 p.m.

Ballroom D

Workshop Session II:

A. **Trust Administration from the Corporate Fiduciary Perspective**

Bart Brown, German American Wealth Advisory Group

Mark Cannon, Fifth Third Bank

Brandy Garrett, 1834, A Division of Old National

Jackie Russell, Baird Trust Company

Ballroom A

B. **Indiana's Probate and Non-Probate Claims Statutes**

J. Beau Dial, Dentons Bingham Greenebaum

Ballroom C

C. **Connolly v. Commissioner: Rethinking Life Insurance, Buy-Sell Agreements, and Business Valuation for Estate Tax Planning**

Ryan Masterson, Kemper CPA Group

1:30 p.m.

Break

1:40 p.m.

Ballroom A

Recent Developments and Case Law Update

Todd Glass, Fine & Hatfield

2:40 p.m.

Break

2:50 p.m.

Ballroom A

Ethics for Estate Planners

Meg Christensen, Dentons Bingham Greenebaum

3:50 p.m.

Adjourn

