

2025 PROFESSIONAL ADVISOR SYMPOSIUM



October 29, 2025 in Pittsburgh and October 30, 2025 in Erie

Grand Hall at The Priory Hotel, Pittsburgh, PA and Ambassador Center, Erie, PA

11:30 a.m. – 6:00 p.m.

11:30am	Registration	
11:45am	Lunch Buffet	
12:00pm	Welcome	
12:15 – 1:15pm	<p><u>Keynote:</u> Economic Development in Southwestern/Northwestern Pennsylvania</p> <p>This session will review the current economic development environment in southwestern Pennsylvania (at the Pittsburgh event) and northwestern Pennsylvania (at the Erie event). Attendees will understand the factors driving our economy, and what trends and factors will affect future outlooks.</p> <p><i>Pittsburgh:</i> Rich Fitzgerald, Executive Director, Southwestern Pennsylvania Commission</p> <p><i>Erie:</i> Panel: Brandon Mendoza, President & CEO, Erie Regional Chamber & Growth Partnership; Tina Mengine, President & CEO, Erie County Redevelopment Authority; Brian Polito, Executive Director, CRIZ Authority; and Kim Thomas, Executive Director, Infinite Erie</p>	
1:30pm – 3:45pm Breakout Sessions (choice of sessions for 1:30pm and 2:45pm)		
1:30 – 2:30pm	<p>#1 The Good, the Bad, and the Dutton (Ugly) Estate Plan for Yellowstone Ranch</p> <p><i>Thomas C. Hoffman, II and Brian M. Seelinger</i></p> <p>Learn how “not to” lose the ranch: Join us for a unique look at the hit TV series Yellowstone through the lens of estate planning. Explore how the Dutton family could have protected their land, avoided devastating taxes, and preserved family unity – all with the right legal strategies.</p>	<p>#2 Grantor Trusts Plus! (Again?!)</p> <p><i>Jerome C. Wegley and Kathryn A. Penick</i></p> <p>This session will review the concept of grantor trusts: why we use them, and what makes a trust a grantor trust. We will also review how to identify the owner of trust income and principal, and common planning opportunities and pitfalls. Finally, we’ll review the nuances of reporting grantor trust income, the three methods for reporting the income, and the “traditional” versus “alternative” reporting methods.</p>
2:45 – 3:45pm	<p>#3 Required Minimum Distributions: The Latest & The Greatest</p> <p><i>Nadia A. Havard</i></p> <p>Explore what an average retirement plan owner needs to know about the current law and its impact on retirement cash flow. We will identify at least three ways to lessen income tax on retirement plan payments and review estate planning options that each plan owner should know. We will also discuss common pitfalls for plan owners to avoid and review typical mistakes in handling and correcting them.</p>	<p>#4 Owner Agreements: Essentials and Cautionary Tales</p> <p><i>Colleen D. Campbell and Jerome C. Wegley</i></p> <p>A well-drafted owner agreement can protect a business, its owners, and its value. This session will cover the essentials of this form of business planning in comparison to the legal defaults that your clients may face absent an owner agreement. Topics ranging from ownership transfer restrictions to strategizing business succession will provide useful insight as you advise clients on planning for their financial future.</p>
4 – 5pm	<p>25 Legal Tips in 50 Minutes: An Experiment in Brevity</p> <p><i>Jacqueline H. Brangard, Neal R. Devlin, Kathryn A. Penick, Jeffrey D. Scibetta & Timothy S. Wachter</i></p> <p>Can our attorneys provide relevant legal information in 2 minutes or less? This fast-paced panel will offer tips on real estate, litigation, elder law, legislative updates, Opportunity Zones, CRIZ, and more.</p>	
5 – 6pm	Networking Reception	