
AMBLER | KEENAN | MITCHELL | JOHNSON

2021 Colorado CPA Seminar

Dear CPAs:

AMBLER | KEENAN | MITCHELL | JOHNSON is pleased to announce that registration for our annual CPA seminar is now open! This year's seminar will be held BY ZOOM on November 3 and 4, and will cover a variety of topics relevant to your business. In this two-day seminar, you can earn sixteen hours of continuing education credits, including two hours of ethics.

Attorneys from AMBLER | KEENAN | MITCHELL | JOHNSON will present various aspects of estate planning while our guest speakers' topics include Cryptocurrency, the Equal Pay for Equal Work Act, Special Needs Trusts, and more. The full list of classes is on page two, and the biographies for our speakers are included on the back page.

Please join us virtually! You can complete the registration form, then scan and email the form to emily@ambler-keenan.com, or fax it to (303) 321-1899. You can also pay by check, and mail your payment and the registration form to us at:

AMBLER | KEENAN | MITCHELL | JOHNSON
Attention: Emily Klimczak
950 South Cherry Street, Suite 1650
Denver, CO 80246

****Advanced registration IS REQUIRED. Only registrations with payments will be processed.****

We're excited to virtually see you by Zoom!

Sincerely,

AMBLER | KEENAN | MITCHELL | JOHNSON, LLC



Elizabeth D. Mitchell



Erica L. Johnson

Join us virtually for 16 hours of continuing education credit!

Date: November 3 and 4, 2021

Time: 8:00am - 4:10pm

Where: Zoom Webinar

*****To ensure you can join the Zoom meeting, we suggest that you sign in 15 minutes prior to the start of each day. You may ask questions in the chat box throughout class.*****

Day 1 Agenda: November 3

- 8:00am-8:50am Erica Johnson— *Estate Planning for Unmarried Couples*
- 8:50am-9:40am Erica Johnson— *ILITS (Irrevocable Life Insurance Trusts)*
- 9:40am-10:00am Break
- 10:00am-10:50am Amanda “Jo” Erven— *The 7 Deadly Ethical Sins of Organizations*
- 10:50am-11:40am Amanda “Jo” Erven— *The 7 Deadly Ethical Sins of Organizations Cont.*
- 11:40am-12:30pm Lunch Break
- 12:30pm-1:20pm Erica Johnson— *Portability*
- 1:20pm-2:10pm Ariel DeFazio— *The Equal Pay for Equal Work Act and
Other Colorado Employment Law Updates*
- 2:10pm-2:30pm Break
- 2:30pm-3:20pm Megan Brand— *Special Needs Trust Planning for Your Clients
Who Have a Loved One with a Disability*
- 3:20pm-4:10pm Kaela Zihlman— *Avoiding Tax Traps– Considerations & Explanations
for Tax Issues in Divorce Cases*

Day 2 Agenda: November 4

- 8:00am-8:50am Elizabeth Mitchell— *Triumph & Tragedy in Probate & Trust Administration*
- 8:50am-9:40am Elizabeth Mitchell— *The Secure Act*
- 9:40am-10:00am Break
- 10:00am-10:50am Jeff Kadavy & Peter Loritz— *Estate Planning Under the Colorado Uniform
Directed Trust Act*
- 10:50am-11:40am Elizabeth Mitchell— *Legal Issues to Consider at the End of Life*
- 11:40am-12:30pm Lunch Break
- 12:30pm-1:20pm Joseph Giulitto- *Estate and Gift Tax Planning*
- 1:20pm-2:10pm Scott Oleson— *Cyber Security Basics*
- 2:10pm-2:30pm Break
- 2:30pm-3:20pm Wesley Parks— *Bankruptcy Basics*
- 3:20pm-4:10pm Brenda Kaser-Burger & Julie Fellows— *Bitcoin and Banking*

Registration

Colorado CPA Seminar

A 16-hour Virtual Continuing Education Course

November 3 & 4, 2021

Zoom classes from 8:00am - 4:10pm

\$225.00 per person if you register by October 15, 2021

**** \$275.00 per person if you register after October 15, 2021 ****

Scan & email to: emily@ambler-keenan.com

Mail to: AMBLER KEENAN MITCHELL JOHNSON

950 South Cherry Street, Suite 1650

Denver, Colorado 80246

Phone: 303-407-1542

Fax: 303-321-1899

Name _____

Firm/Organization _____

Address _____

Phone _____ Fax _____

E-mail _____

COLORADO CPA License Number _____

Yes, please enroll me in the Colorado CPA Seminar on November 3 and November 4, 2021

Tuition is **\$225.00** per person if paid *by 10/15/21*.

****\$275.00** if paid *after 10/15/21* (includes late fee).**

NO REFUNDS WILL BE ISSUED AFTER OCTOBER 15TH, 2021

Check enclosed in the amount of _____ payable to AMBLER KEENAN MITCHELL JOHNSON

Circle One: Card Number _____

CVV-Code (last 3 digits on back of card) _____

Visa Mastercard Billing Address w/Zip Code _____

Expiration Date _____

Signature _____

Payment must accompany your registration form. Advanced registration IS REQUIRED.

Your Speakers

Elizabeth D. Mitchell, JD, CELA— AMBLER | KEENAN | MITCHELL | JOHNSON

Beth received her BA from Drake University and was awarded her JD from the University of Denver - College of Law. Beth is a member of the American Academy of Estate Planning Attorneys, the National Academy of Elder Law Attorneys, and the Elder Law Section of the Colorado Bar Association. Beth is also a Certified Elder Law Attorney* through the National Elder Law Foundation. Beth's practice emphasizes estate planning, probate, and trust administration.

Erica L. Johnson, JD— AMBLER | KEENAN | MITCHELL | JOHNSON

Erica received her BS in Broadcasting Management from Northern Arizona University. She was awarded her JD from the University of Denver - College of Law. She is a member of the American Academy of Estate Planning Attorneys, the Colorado Women's Estate Planning Council, the Denver Bar Association, Trusts and Estates section of the Colorado Bar Association, and the Colorado Women's Bar Association. She is a frequent speaker on the topic of estate planning for same-sex couples and unmarried couples.

Amanda "Jo" Erven, CPA, CIA, CFE— Audit. Consulting. Education. LLC

Amanda "Jo" Erven, CPA, CIA, CFE, is the President and Founder of Audit. Consulting. Education. LLC. After a career in audit and accounting, Jo is now an Internal Audit Strategist, Ethics and Culture Consultant, Higher Education Professor, Author, and Trainer/Speaker, providing Continuing Professional Education (CPE) hours to organizations across the globe. Jo's motto says the most about her personal and professional outlook: *"Good things come to those who wait... but don't. You deserve better than good."*

Ariel DeFazio, JD— Sweeney & Bechtold, LLC

Ariel DeFazio is an attorney at the law firm of Sweeney & Bechtold, LLC where she represents employees in state and federal litigation, administrative investigations of discrimination, and unemployment insurance appeals. Ariel holds her J.D. from the University of Colorado Law School and volunteers periodically providing legal assistance to pro se litigants through the CBA's Federal Pro Se Legal Clinic, as well as to Colorado nonprofits through the Colorado Lawyers Committee's Non-Profit Pro Bono Legal Group.

Megan Brand— CFPD (Colorado Fund for People with Disabilities)

Megan Brand is the Executive Director of CFPD-Colorado Fund for People with Disabilities. Megan began her service at CFPD in 2003 and has been the Executive Director since 2010. Megan has a bachelor's degree in social work from the College of St. Benedict and over 20 years of experience. She leads a staff of 26 and currently serves on the board for the National Planned Lifetime Assistance Network and is a frequent presenter in the community, both locally and nationally, on Special Needs Trusts and related topics.

Kaela Zihlman, JD— Willoughby & Associates, LLC

Kaela Zihlman is a Senior Associate Attorney with Willoughby & Associates, a domestic relations litigation and estate planning and administration firm in Golden, Colorado. Kaela specializes in matters involving complex financial divorces, premarital agreements, and appeals. Prior to joining the firm, Kaela clerked for Judge Robert L. McGahey, Jr. in Denver District Court where she witnessed first-hand how going to court is oftentimes not in families' best interests.

Jeffrey Kadavy, JD, CTFA & Peter Loritz, JD, CTFA- Trail Ridge Wealth Management

Jeff is the President and CEO of Trail Ridge Wealth Management and earned his Bachelor of Arts degree from Oberlin College and his law degree from the University of Nebraska College of Law. Peter is the CFO at Trail Ridge Wealth Management and earned his undergraduate degree in Finance, Investments, and Banking from the University of Wisconsin-Madison and his law degree from the University of Denver's Sturm College of Law.

Joseph Giulitto— ColleeInvest

Joseph has been in the financial services industry since 1998. Throughout his career, Joe has followed the simple idea: If you can identify the need, then a solution is eminent. Joseph has a Bachelors of Science in business for the University of Southern Colorado and Harvard Executive Business School with a specialty in Global Economics and History. Joseph resides in Colorado with his sons Joe, Vince, his wife of 21 years, Angela.

Scott Oleson— Analytics Computers

Scott is the Chief Executive Officer & Owner of Analytics Computers, the Premier Rocky Mountain Region Technology Solutions Provider. Scott has experience in customer service, operations, problem solving, communications, computer operations, software applications, software development, Server and PC management, vendor relations, and budgeting. Scott received his education from Colorado Christian University, Argosy, University of Phoenix and University of Northern Colorado.

Wesley Parks, Esq.— Cohen & Cohen, P.C.

Wesley is a consumer bankruptcy and family law attorney at Cohen & Cohen, P.C. focusing and teaches Mediation and Negotiation and Alternative Dispute Resolution as an adjunct professor at the University of Denver - Sturm College of Law. Mr. Parks is also mediator and owner of Parks Mediation, and a contract mediator for the Colorado Office of Dispute Resolution and for the Colorado Department of Education. He is the current Chair of the Colorado Bar Association - Alternative Dispute Resolution Section.

Brenda Kaser-Burger, MSM, CDI.D— Independent Board Director &

Julie Fellows, QFE, CDI.D, OCC— Independent Board Advisor

Brenda Kaser-Burger is an independent corporate director with more than 30 years of Fortune 500 experience as an accomplished executive, an investor/Board of Director with several start-ups and serves on two non-profit Boards as Treasurer and Chair of the Finance & Risk Committees. She holds a Bachelor of Science in Math/Computer Science, a Master of Science in Management and is a Certified Board Director under CDI.D and is on the Board of Directors for the Wyoming Deposit & Transfer Bank.

Julie Fellows is an independent corporate director, an advisor to boards and C-suites and a senior banking executive skilled in leading transformational change initiatives. Julie is a Qualified Financial Expert (QFE) under SEC requirements, a Certified Board Director under CDI.D, and an OCC Commissioned National Bank Examiner. Julie holds a Bachelor of Science in Business Administration and International Business from the University of Colorado, Leeds School of Business, a certificate in International Finance and Politics from the London School of Business and Finance and a certificate in Cyber-Security Risk Management from Harvard.