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WREFPC.ORG
PO Box 2396
Rapid City, SD 57709

West River Estate & Financial Planning Council

2025 Speaker Series

WRE&FPC is an organization of Financial Planners, Trust Officers, Non-Profit Executives/Planned Giving Professionals, Accountants, Attorneys, and Life Underwriters in Western South Dakota.

We help members stay up to date with the ever changing laws and conditions affecting estate planning, business and personal taxation, and the problems of estate accumulation and conservation. Our goal is to offer continued education improving the knowledge of each member while encouraging the highest level of professional service to the public. WREFPC is a member of the National Association of Estate Planners & Councils.

Visit our website **wrefpc.org** for our full schedule of events. View detailed bios for all our speakers and find links to our sponsors, view our membership directory, download membership applications, and much more!

WREFPC.ORG
PO Box 2396
Rapid City, SD 57709

2025 Registration Details

All members (and guests*) must RSVP for each speaker.

RSVP via email registration at the beginning of each month. Email will be sent from wrefpc@gmail.com (May-Sept).

Wednesday: May 21, June 18, July 16, August 20, September 17

Time: 11:00am Networking Lunch
11:30am—1:00pm Speaker Presentation

Location: Gallery Room, The Journey Museum

2025 Executive Committee

President: Cale Fierro, Bangs McCullen Law Firm
Vice President: Tamara Burke, Financial Benefits Inc.
Treasurer: Barb Keene, Black Hills Area Community Foundation
Secretary: Jesse Jangula, Ketel Thorstenson, LLP
Additional Board Members:
Anthony Kosobud, First Interstate Wealth Management
Frances Becker, South Dakota Trust Company LLC
Jacob Stewart, Gunderson, Palmer, Nelson, Ashmore, LLP
Lindsy Luper, Edward Jones
Val Simpson, Friends of SDPB
Past President: Andy Bartling, Modern Woodmen of America

Guest Attendance

Members must RSVP for their guests.

Each member is permitted 1 free guest attendance per season. Members are also permitted 2 paid guests per season. The cost is $30 per guest, payable by cash or check at the door. Any individual guest may attend a maximum of 2 seminars per year before joining as a member. If a guest joins as a member, the membership fee will be reduced by any amount paid as guest fees.

Wednesday, May 21

One Choice….can impact generations; Protecting against the Great Retirement Income Gap

Presented by:

Brent DeGroot

Regional Accounts Director
OneAmerica

Biography

Responsibilities

Brent works with independent marketing organizations (IMOs) and brokerage general agencies (BGAs) to grow the OneAmerica® Care Solutions Asset-based LTC product line. He provides his insight, experience, and training to IMO/BGA leadership, back offices, and producers to support and drive the growth of the Care Solutions portfolio.

Career history

Brent is an industry veteran with 23 years of knowledge in the LTC, life, and annuity brokerage. Before joining OneAmerica in 2019, Brent spent more than 10 years with Mutual of Omaha, developing relationships and achieving success with brokerage distribution partners. He has also worked for the American Enterprise (World Insurance and American Republic) and owned an agency in Phoenix, Arizona, where he began his career in the industry in 1998.

Professional designations

Brent holds the Certified in Long-Term Care (CLTC) designation and the Long-Term Care Professional (LTCP) designation.

Education

Brent is an alumnus of the University of Nebraska-Omaha.

Personal

A resident of Omaha, Nebraska, Brent has two children—a daughter, Quinn, and a son, Porter. In his spare time, Brent enjoys spending time with his family, serving in his community, watching U.S. National soccer teams, playing golf, boating, and traveling domestically and abroad.

Wednesday, June 18

Powerful Trust Laws to Combat Future Uncertainties: The Need for Flexibility

Presented by:

Al W. King III

Co-Chairman, & Co-Chief Executive Officer, South Dakota Trust Company, LLC and SDTC Related Companies

Biography

Al W. King III is the Co-Chairman and Co-Chief Executive Officer of South Dakota Trust Company LLC (SDTC) and SDTC Related Companies with offices in South Dakota, New York, Wyoming, Nevada and Westport, CT. SDTC is a national trust boutique serving wealthy families from 54 countries and 47 states. SDTC currently has more than $165 billion in assets under administration.

Mr. King was previously Managing Director and National Director of Estate Planning for Citigroup. Mr. King was also the Co-Founder and Vice Chairman of Citicorp Trust South Dakota. Mr. King also previously served as Director of Financial and Estate Planning for Coopers and Lybrand in Stamford, Connecticut.

Mr. King is the Co-Vice Chairman of the Editorial Board of Trusts & Estates Magazine. He has been a member of the Editorial Board for over 30 years. Mr. King has been inducted into the National Association of Estate Planners & Councils (NAEPC) Estate Planning Hall of Fame as an Accredited Estate Planner (AEP), Distinguished. Mr. King previously served on the Board of Directors for NAEPC and is the Former Chairman of the NAEPC Foundation Advisory Board. He is currently a member of both the NAEPC webinar and publications committees. He is also a member of several groups and organizations including the Society of Trust and Estate Professionals (STEP), the International Association of Advisors in Philanthropy (AiP), New York Philanthropic Advisors Network (NYPAN), Fairfield County and New York City Estate Planning Councils, etc. In addition, he is frequently published and quoted by several publications on various Estate Planning topics and addresses several professional organizations, special interest groups, and general audiences on the subject of estate and trust planning.

Mr. King received a Bachelor of Arts cum laude from Holy Cross College, a Juris Doctor from Syracuse University College of Law and an LL.M. in Tax Law from Boston University School of Law

Wednesday, July 16

The future of Wealth Management/Estate Planning from the perspective of 36 years in the business.

Presented by:

Jon Dahlstrom

Principal
Edward Jones

Biography

Edward Jones Principal, Jon Dahlstrom, is responsible for the Service division, which serves and supports clients and branch teams through daily interactions on a wide variety of requests by partnering to understand needs and delivering tailored support for exceptional client experience.

Jon began his Edward Jones career in 1989 as a financial advisor in Spokane, Washington. In 1996, while he and his wife, Wanda, were expecting their third child, they relocated to Custer, S.D., where they lived for nearly 20 years. Jon and Wanda became deeply involved in the community and raised their three children in Custer.

While serving as a financial advisor, Jon completed multiple asset-sharing programs to increase the positive impact Edward Jones has on the lives of individual investors. He also embraced the firm's rich history of volunteerism by serving in nearly every regional leadership role, including regional leader. He also qualified for eight Managing Partner's Conferences, the annual event that recognizes the top 400 of the firm's financial advisors.

In December 2015, Jon relocated to St. Louis headquarters to join Branch and Region Development and lead Area 8. He was named a partner in 2016 and, over the next three years, led multiple areas and guided several area leaders. In 2019, Jon assumed responsibility for leading Edward Jones Trust Company. In March 2022, Jon joined the U.S. segment team co-creating an overall strategy and specific outcomes to consistently deliver a compelling value proposition to clients and branch teams, before assuming his current responsibilities in November 2023.

A native of Rapid City, S.D., Jon graduated from Pacific Lutheran University in Tacoma, Washington, and holds the CFP® professional designation.

Wednesday, August 20

The Optimized Gift Trust & Funding Designs: A Turnkey Solution for Pre-2026 Gifts

Presented by:

Jonathon Morrison
Senior Partner
Frazer Ryan Goldberg & Arnold LLP

Biography

A renowned innovator and technician in his space, Jonathon's thought leadership and knack for developing novel, cutting-edge solutions has resulted in multiple advances in the field of advanced tax and estate planning. In addition to publishing multiple peer-reviewed articles featured on the cover of the national Estate Planning Journal (the top legal journal in the field), Jonathon has been featured in Forbes, Fortune, Bloomberg, and Barrons, as well as several nationally syndicated podcasts, with respect to strategies involving income and estate tax minimization, charitable and philanthropic giving, business exit and succession planning, and asset protection.

For nearly 20 years, Jonathon has practiced with the top tax and estate planning law firms in Silicon Valley and Phoenix. Before his family relocated to his hometown of Phoenix in 2015, Jonathon worked with the personal tax planning group associated with Wilson Sonsini, the "go-to" law firm in Silicon Valley which led IPOs for Apple, Google, Amazon, Tesla, and hundreds of other top tech companies. During this time, Jonathon designed and implemented estate plans for hundreds of the wealthiest individuals in the world, including founders, C-level executives, venture capitalists, and angel investors. As soon as he arrived in Phoenix, Jonathon's unique skill set quickly distinguished him as one of Arizona's premier tax and estate planners.

A pioneer at the forefront of the tax and estate planning sector, Jonathon is also credited as the developer and publisher of multiple innovations in the field, including (i) the 'optimized gift trust' (OGT) (a solution for wealthy individuals to reduce the federal estate tax, but retain maximum access and control ofthe assets within IRS limits), (ii)the 'optimized CLAT' (OCLAT) (a special variant of charitable lead trust which maximizes the tax and economic benefits of philanthropy, as well as donor control), and (iii)the 'marital multiplier trust' (MMT) (a variant of non-grantor inter vivos QTIP trust designed to maximize the benefits of QSBS stock).

Outside of the office, Jonathon treasures his time with his wife and two young children. They primarily live in Scottsdale, but their favorite time of the year is the summer, when the whole family sets sail to Paris to beat the Arizona heat in their Saint-Germain-des-Pres flat (and Jonathon takes advantage of the nine-hour time zone difference). Jonathon is also a performance car enthusiast and passionate collector of Ferraris, Porsches, and BMWs. On the weekend, you can usually spot him (and one of his kids riding shotgun) at Cars & Coffee or participating in high-performance driving events.

Wednesday, September 17

Charitable Giving Strategies for Attorneys and Accountants

Enjoy Giving: Unlocking the Power of Philanthropy—for Your Clients and Yourself

Presented by:

Eric Zimmer, PhD
Vice President of Philanthropy and Special Projects
Black Hills Area Community Foundation

Biography

Eric Zimmer, PhD, is Vice President of Philanthropy & Special Projects at the Black Hills Area Community Foundation. He grew up in Rapid City, went to Black Hills State University, and earned his PhD in American History from the University of Iowa. Zimmer is a former museum and philanthropy consultant and university professor who is presently pursuing a certificate in nonprofit leadership through the Executive Education program at the Harvard Kennedy School. He has facilitated millions of dollars in donor-directed grantmaking and raised millions more for nonprofits throughout the region. Zimmer serves on the Cultural Advisory Committee for the Sanford Underground Research Facility, was a longtime volunteer for the Rapid City Indian Boarding School Lands Project, and was previously a member of the Journey Museum's board.