

The best of both worlds

Planning institute covers vital issues and encourages personal time

Courtesy of the Community Foundation of Southern New Mexico

Because they are working in an area that is constantly changing, estate planners are often tasked with following state and federal rules while meeting the delicate needs of their clients.

In an effort to ensure estate planners throughout southern New Mexico are keeping up with the highly technical and changing area, the Community Foundation of Southern New Mexico (CFSNM) held the 19th annual Estate Planning

Institute Nov. 1.

“The speakers covered unique topics that were timely,” said Josh Dwyer, an estate-planning attorney with Holt Mynatt Martinez P.C. “The institute is an invaluable resource for our community, not only for estate planners, but also for our clients who benefit from more knowledgeable advisors.”

Before the Estate Planning Institute was created, attorneys, accountants, financial planners, trust officers, investment advisors, estate planning and tax practitioners, life underwriters and anyone interested in learning more about effective estate planning for their clients had to travel as far as Albuquerque to attend classes for their continuing education credits. Now local, statewide and national speakers participate in the program, providing continuing professional education credits with an added focus on ethics and professionalism.

The Estate Planning Institute, held Nov. 3 and 4 at Hotel Encanto, featured speakers Tom Popejoy, recently retired vice president of New Mexico Bank & Trust in Albuquerque; David Hassler, attorney with Scott Hulse P.C. in El Paso; Nell Sale and Marcy Baysinger, attorneys with Pregenzer, Baysinger, Wideman & Sale in Albuquerque; George Weir, recently retired senior vice president of First Hawaiian Bank Trust Division in Honolulu; Glenn Davis, attorney with Scott Hulse P.C. in Las Cruces; Grace Allison, vice president and tax strategist at Northern

Trust in Chicago; Vickie Wilcox, attorney at Wilcox Law Firm in Albuquerque; Alan Gluth, attorney at Gluth Law L.L.C. in Las Cruces; Ken Leach, attorney at Kenneth C. Leach & Associates in Albuquerque; Joanna Reiver, attorney with Potter Anderson & Coroon in Delaware and Eric Darnell, attorney with Eric Darnell Law in El Paso.


Topics included international issues in estate planning, business succession planning, wealth transfers and income tax developments in 2011 and estate planning in marriage, among many other valuable topics.

“One important thing that came up several times with several different speakers was the importance of taking extra time with clients to make sure needs are better understood. Once we understand those needs we can better meet their needs,” Dwyer said. “All the speakers were very well informed and this was a good opportunity to earn continuing education credits while meeting other people specializing in this field.”



DWYER

The Community Foundation of Southern New Mexico is dedicated to helping the southern New Mexico community now, and in the future. Founded in 2000, the Community Foundation offers opportunities for local people who want to give back locally. The beauty of the foundation is that you need not be wealthy to make a positive difference in the lives of people throughout our area. Through the establishment of permanent funds you can sustain local charitable organizations, provide scholarships to area students and fulfill wishes that are close to your heart. Through our planned giving programs, you can honor loved ones or leave a legacy that benefits the people of southern New Mexico for generations to come. The Community Foundation of Southern New Mexico can advise you on how best to maximize contributions, no matter what size. For more information see our website at www.cfsnm.org or call Luan Wagner Burn Ph.D., at 521-4794. To donate, mail your check to CFSNM, 301 St. Church St., Suite H, Las Cruces, NM 88001.

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