

The Community Foundation of Volusia & Flagler and the Estate Planning Council of the Fun Coast
proudly present the

2014 Financial Symposium

This is a special invitation to attend the
2014 Financial Symposium
“PLANNING FOR THE FUTURE:
Ways to Fulfill Your Charitable Vision ”

This event is sponsored by the Community Foundation of Volusia & Flagler, in partnership with the Estate Planning Council of the Fun Coast, as a service for local financial professionals to earn their required continuing education credits. This year we are featuring special guest speakers representing: the Ladies Professional Golf Association, Your Caring Law Firm of Maitland, and Crotty & Bartlett Associates of Daytona Beach.

DATE: Thursday, October 30, 2014
COST: \$20.00 (Includes buffet breakfast)
TIME: Registration & breakfast
8:00 AM – 8:30 AM
LOCATION: Holiday Inn LPGA
137 Auto Mall Circle, Daytona Beach, FL
RSVP: kselis@palmcoastlaw.com or 386-445-8900



Kathryn H. Milthorpe, Chief Financial Officer & Treasurer
LPGA

Nancy Henderson, President
LPGA Foundation

Daytona Beach, Florida 8:40 AM – 9:20 AM

“Community Impact of Philanthropy at the Ladies Professional Golf Association”

Kathleen L. Crotty, Principal
Crotty & Bartlett P.A.

Daytona Beach, FL 9:30 AM – 10:20 AM

“Estate Planning Implications of Charitable Lead & Remainder Trusts”

Mary Merrell Bailey, Principal
Your Caring Law Firm

Maitland, FL 10:30 AM – 11:20 AM

“Downton Abbey and Missed Opportunities in Estate Planning”



Estate Planning Council
of the Fun Coast



Credits: 3.0 CLE, 3.0 CFP, 3.0 CPA, 3.0 CLU



Kathryn H. Milthorpe is Chief Financial Officer and Treasurer of the Ladies Professional Golf Association and the LPGA Foundation, where she is responsible for leading the financial affairs and administrative activities of the association's national headquarters. As a senior executive in LPGA's corporate headquarters in Daytona Beach, Kathy has helped the LPGA become the worldwide leader in developing and promoting women's professional golf. Founded in 1950, the association celebrates a diverse and storied membership with more than 2,300 LPGA Tour, Teaching & Club Professional Tour members representing 30+ different countries. Kathy previously served as Managing Director of Public Affairs for the International Speedway Corporation. Kathy's career includes service as a Senior Auditor with the accounting firm Price Waterhouse Coopers in Houston, Texas, and she currently serves as a board member of United Way of Volusia-Flagler Counties and the Daytona State College Foundation. She has a Bachelor's Degree of Business Administration in Accounting from Texas A&M University.



Nancy Henderson serves as both President of The LPGA Foundation and Chief Teaching Officer for the LPGA Teaching & Club Professional Membership. In these roles, she supervises the day-to-day operations of both organizations within the LPGA. Prior to joining the staff at LPGA Headquarters, Ms. Henderson was the Director of Golf and General Manager at LPGA International Golf Course, the home course of the LPGA, for over seven years. In 2001, she received the LPGA National Professional of the Year award for her accomplishments at LPGA International. A native of Clearwater, Florida, and a graduate of Southern Methodist University in Dallas, Texas, Nancy earned a four-year scholarship as a member of SMU's women's golf team. A two-time US Open participant, her playing accomplishments include more than 300 tournament victories and 13 holes-in-one.



Kathleen L. Crotty is a partner in the law firm of Crotty & Bartlett, with deep roots in the Volusia County area. A substantial part of her practice is devoted to estate planning, probate and guardianship. Ms. Crotty is a Certified Public Accountant and a member of the Volusia County & Florida Bars, the American Institute of CPA's, and the Volusia County Institute of CPA's. She is a frequent speaker on radio talk shows on the subject of estate planning and has participated as an instructor in continuing education seminars for the Florida Bar. Among her many credentials in community service, Kathy is a board member of the Daytona State College Foundation and is a member and past-Chair of the Community Foundation of Volusia & Flagler (a division of the United Way of Volusia-Flagler Counties). She obtained her Bachelor's degree from Jacksonville University, an MBA from the University of Florida, and her JD from the University of Florida.



Mary Merrell Bailey is Managing Partner of Your Caring Law Firm, and limits her practice to estate planning with a focus on end-of-life issues, the unique needs of the elderly, unmarried couples, and individuals who hope to protect their family wealth. Her overall practice areas include charitable planning, family limited partnerships, and non-profit organizations. Faced with helping her own aging parents with their elder legal needs, Merrell realized that there was a need for a legal counsel who truly helps clients feel relieved and non-threatened when navigating the estate planning process. To help fill that need, as a graduate of the University of Central Florida she attended Barry University School of Law and received her JD degree, graduating as valedictorian of her class. She holds five business degrees from UCF, including a B.S.B.A. in Finance and a B.S.B.A. in Accounting, an MBA, an M.S. in Taxation, and an M.S. in Accounting. Merrell is a Certified Public Accountant, and serves as a board member for the National Endowment for Financial Education.