

Agenda
North American Death Care Regulators Association
32nd Annual Conference
September 12-14, 2017
The Benson Hotel
309 SW Broadway, Portland, Oregon 97205

Monday, September 11, 2017

5:00 PM – 6:00 PM

Meet fellow regulators in Hotel Lobby followed by informal dinner at ?

Tuesday, September 12, 2017

7:30 AM – 8:30 AM

Registration and breakfast (provided) in the Windsor Conference Room

8:30 AM – 10:15 AM

Welcome, Introductions, Business Meeting and Committee Reports

10:15 AM – 10:30 AM Break

10:30 AM -12:00 PM

Presentation by Guy Tasa, Ph.D, Washington State Physical Anthropologist, Washington Dept. of Archeology & Historic Preservation

12:00 PM – 1:00 PM Lunch (provided) in the Windsor Room

1:00 PM – 2:00 PM

Turn Around of Distressed Properties and Succession Planning by Attorney Lewis Hoch of Blank Rome and Dan Isard of The Foresight Companies

2:00 PM – 2:15 PM Break

2:15 PM – 3:45 PM

FTC Developments Impacting Death Care by Jennifer Larabee and Attorney Alex Livshits of Fried Frank

3:45 PM – 5:15 PM

Current Legal Trends in Death Care by Professor Tanya Marsh of Wake Forest University College of Law, and Attorney Lewis Hoch of Blank Rome

Dinner on your own

Wednesday, September 13, 2017

7:30 AM – 8:30 AM

Breakfast (provided) in the Windsor Conference Room

8:30 AM – 10:00 AM

Understanding Financial Statements, Investment Policy Statements and Valuations by Vickie Kozuck, Sandra Wheeler and Karen Richards of Wells Fargo Advisors

10:00 AM – 10:15 AM Break

10:15 AM – 11:15 AM

Abandoned Trusts and Escheat Regulations by Dennis Britson, Iowa

11:15 AM – 12:15 PM

Personally Identifiable Information from a Banking Perspective by Elizabeth Kmiec and Ashlee Theising, ClearPoint Trust

12:15 PM – 1:15 PM

Lunch (provided) in the Windsor Room

1:15 PM – 2:30 PM

Presentation by Luke Frieberg, Steve Lang, Steve Schaffer and Ben Brown of Homesteaders Life Insurance

2:30 PM – 2:45 PM

Break

2:45 PM – 5:00 PM

Round Table Discussions: Regulatory Issues, State and Provincial Reports

6:00 PM

NADCRA Member Dinner at Huber's Restaurant

Thursday, September 14, 2017

7:30 AM – 8:30 AM

Breakfast (provided) in the Windsor Conference Room

8:30 AM – 10:00 AM

The Financial Investigation by Tiffany Couch, CFE of Acuity Forensics

10:00 AM – 10:15 AM Break

10:15 AM – 11:45 AM

**Presentation on Death Care Midwives by Char Barrett, A Sacred Moment
Funeral Home, Everett, WA**

11:45 AM – 12:45 PM Lunch (provided) in the Windsor Room

12:45 PM – 2:00 PM

Unitrusts by Funeral Services Inc., and Attorney Wendy Wiener

2:00 PM – 2:15 PM Break

2:15 PM – 5:00 PM

**Round Table Discussions: Regulatory Issues, State and Provincial
Reports and Incoming President's Report**