

# 2025-2026

## Calendar of Speakers & Events

**Registration 11:15am | Buffet Opens 11:30am**

**Program 12:00pm-1:10pm**

*Unless otherwise noted*



**8**  
Sep

**Catherine Welsh, JD** Welsh & McGough, PLLC  
*Guardianship 101: Everything You May Need to, May  
Want to, or Hope Not to Know but are Afraid to Ask?*

**20**  
Oct

**Julie Rivers, Esq.** Cuddy & McCarthy, LLP  
*Dancing with the Gorilla: "Practical Solutions for  
Substance Abuse and Mental Illness"*

Member/Guest  
Recognizing TEPF  
Past Presidents

**10**  
Nov

**Mark Lingerfield** Management Planning, Inc.  
*Valuation Hot Topics*

Members Only

**2**  
Dec

**Breakfast at The Summit**  
*NAEPC Webinar To-Be-Determined  
7:45am-9:15am | The Summit Club Downtown*

Members Only

**12**  
Jan

**Economic Update**  
*Steve Wyett, Chief Investment Strategist  
BOK Financial*

**9**  
Feb

**James C. Milton, Esq.** Hall Estill  
*Oklahoma Uniform Trust Code & Other  
Legislative Developments*

**9**  
Mar

**Russell James, J.D., Ph.D.** Texas Tech University  
*Live Webinar with Q & A: Top 10 Charitable Financial Planning  
Strategies: Helping Your Clients & Business with Charitable Planning*

**20**  
Apr

**Susan Rounds, JD, CPA, LL.M., AEP (Distinguished)**  
*Family Dynamics & Intergenerational Conflict:  
Preserving Family Wealth and Harmony*

**23**  
Apr

**April Social**  
*The Tom Tom Room inside The Vault Restaurant  
5:00pm-7:00pm*

Members Only

**4**  
May

**Marty Shenkman, CPA, JD, AEP (Distinguished)**  
*Marty's Best Estate, Business & Tax Planning Ideas  
Registration 1:00pm | Program 1:30pm-4:00pm*

Annual Meeting

Unless otherwise specified, all meetings are held at the  
DoubleTree Hotel Downtown | 616 W. 7th St., Tulsa, OK 74127

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Register at [www.tulsaepf.org](http://www.tulsaepf.org)