

2026-2027 Calendar of Speakers & Events



14
Sep

Russell James, J.D., Ph.D.
Foundation Chair, Texas Tech University

Top 10 inheritance myths: What really happens to heirs, wealth and giving in the "Great Wealth Transfer"

1
Oct

October Social

*Harwelden Mansion
5:00pm-7:00pm (Member/Guest)*

19
Oct

Ash Ahluwalia, CFP®, MBA, NSSA
Strategies to Increase Social Security Benefits

Member/Guest

21
Oct

**NAEPC
Estate Planners Forum Conference**

*Virtual from 11:00am-4:30pm
Register at: www.estateplannersforum.org*

19-25
Oct

Estate Planning Awareness Week

5
Nov

Young Professional's Network Social

*Nothing's Left Brewery
5:00pm-7:00pm (Member/Guest)*

16
Nov

Leslie Amann, J.D., AEP®
"Say what you mean" Results of Ambiguities in Documents

Members Only

8
Dec

Breakfast at The Summit
Cindy Brown, JD & Kim Kamin, JD, AEP®(Distinguished)
"Letters of Wishes: Helpful Guidance from the Grave"

*Honoring TEPF
Past Presidents*

*The Summit Club Downtown
7:45am-9:15am (Members Only)*

19
Jan

Brad Zerger
Chief Investment Officer, BancFirst

Annual Economic Update

26
Jan

Young Professional Breakfast

*Two Warren Place
7:45am-9:15am (Members Only)*

8
Feb

Brian Lee Whisenhunt
Executive Director & CEO, Gilcrease Museum

Welcome to the New Gilcrease

8
Mar

Expert Panel Discussion

Interdisciplinary panel of experts for an interactive case study and Q&A on estate and financial planning

19
Apr

Steve Akers, J.D.

Estate Planning Current Developments

22
Apr

April Social

*Location pending confirmation
5:00pm-7:00pm (Members Only)*

3-7
May

NAEPC Annual Conference

Tampa, FL

10
May

Michael Finke, Ph.D., CFP®
"Creating A Tax-Efficient Intergenerational Wealth Plan"

Annual Meeting

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

Registration 11:15am | Buffet Opens 11:30am | Program 12:00pm-1:10pm

Register at
www.tulsaepf.org