

# Oklahoma City Estate Planning Council, Inc.

([www.okcepc.org](http://www.okcepc.org))

Membership Comprised of:  
Attorneys, Certified Public Accountants,  
Chartered Life Underwriters, Chartered Financial Consultants,  
Certified Financial Planners and Trust Officers

2021-2022

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The next Oklahoma City Estate Planning Council meeting will be on:

**Thursday, January 13, 2022, 7:30 – 8:45 a.m.**  
**Oklahoma City Community Foundation (“OCCF”),**  
**1000 Broadway, Oklahoma City, Oklahoma**

We are pleased to present as our speaker, Jason E. Richards, J.D., M.ACC, with Resolution Legal Group in Oklahoma City. Mr. Richards will have a presentation on Qualified Opportunity Funds, how they work, where they are located, and what it takes to get qualified.

**If you have any suggestions for future speakers and/or topics, please contact a board member.**

Please respond to Carol Thompson whether or not you will be attending the meeting. If you are bringing a guest, please provide the guest's name. **Guests are welcomed and encouraged.**

By email: [cthompson@hartzoglaw.com](mailto:cthompson@hartzoglaw.com)  
By facsimile: 996-3403

**GUEST BREAKFAST FEE OF \$30 PER GUEST WILL BE COLLECTED AT THE MEETING.**

**Please respond no later than Monday, January 10, 2022**

**Our objective is to promote friendship and cooperation among the members of the Council to the end that the public may be better served in the planning and administration of trusts and estates.**

# JASON E. RICHARDS, J.D., M.ACC.

Many folks groan at the word, “taxes”, but not Jason. As a business and tax attorney, he advises clients in a variety of tax and business planning matters, including business formations, tax structure, reorganizations and general operational counsel. Jason also uses his tax skills to develop comprehensive estate and asset protection plans for all types of individuals and has helped business owners develop effective succession plans for their closely held businesses. He also works on compliance of non-profit organizations and enjoys engaging with nonprofit organizations to help efficiently navigate the regulatory requirements of state and federal law. The OU grad once worked in an international accounting firm where he gained experience in audit and taxation and got his JD from Southern Methodist University Dedman School of Law. He lives in Edmond with his wife where they enjoy making any excuse to be outside with their dogs.

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