

Oklahoma City Estate Planning Council, Inc.

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

2019-2020

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MEETING NOTICE

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

Thursday, January 9, 2020, 7:30 – 8:45 a.m.
Oklahoma City Community Foundation (“OCCF”), 1000 N. Broadway Avenue,
Oklahoma City, Oklahoma 73102

We are pleased to present as our speaker, Dawn Hallman. Ms. Hallman will have a presentation on “Deferred Sales Trust”.

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

By facsimile: 996-3403

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

Please respond no later than Monday, January 6, 2020.

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.

Dawn D. Hallman is the Principal Attorney and founder of Hallman & Associates. As a nationally recognized estate planning attorney, with a background in tax, Dawn has extensive experience helping clients with all facets of business, tax, and estate planning.

Rated as an AV Preeminent Attorney™ by Martindale Hubbell, Dawn creatively and effectively addresses the estate planning needs of modest to ultra-high net worth families. She possesses a robust tax background, holding both an accounting and law degree from the University of Oklahoma. Her tax and business law background make her uniquely qualified to advise clients on complex estate and business planning matters. With a focus on asset protection and tax planning, Dawn strives to create an educational environment that ensures her clients understand and achieve their legacy plans.

In addition to her law practice, Dawn frequently lectures on estate planning matters in continuing education programs for legal, financial, and other business professionals. In 2016, Dawn served as Chairman for the Estate Planning, Probate and Trust Section of the Oklahoma Bar Association. She is a charter member of the Legacy Rotary Club in Norman, Oklahoma, and Dawn serves as the Board of Directors Vice-Chairman for both Washita State Bank and Frontier State Bank.

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