

Oklahoma City Estate Planning Council, Inc.

(website: okcepc.org)

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

2022-2023

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

Thursday, May 4, 2023, 7:30 a.m. – 8:45 a.m. (BREAKFAST MEETING)
Oklahoma City Community Foundation (“OCCF”),
1000 Broadway, Oklahoma City, Oklahoma 73102

We are pleased to present as our speaker, Jill Castilla, President and CEO of Citizens Bank of Edmond. Ms. Castilla will be speaking on *Main Street over Wall Street*.

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

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: 405.996.3403

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

Please respond no later than Tuesday, May 2, 2023

NOTE: OKCEPC Membership is at the individual level. All nonmember attendees are considered guests and are required to pay the \$30 guest fee. Please note that if a member is unable to attend and sends a nonmember to the meeting, then the \$30 guest fee applies.

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.



Jill Castilla

As President & CEO of Citizens Bank of Edmond, a one location \$350 million community bank in suburban Oklahoma City, and Chairman of Citizens Bancshares, Inc., Jill Castilla is a nationally recognized innovator in banking and financial technology. Jill currently serves on the 12-member Federal Advisory Council for the Federal Reserve Board of Governors representing the 10th Federal Reserve District. She is a Civilian Aide to the Secretary of the Army, a three-star protocol role, and chairs the SW Graduate School of Banking at SMU. Jill serves on the boards of MetaFund CDFI, Oklahoma Hall of Fame, Castle Creek Capital, Port Authority of Oklahoma City, Mercy West, Humphreys REIF and YMCA. She recently served on the American Bankers Association Board of Directors. Jill is a previous Chairman of the Community Bankers Association of Oklahoma and continues to serve on its Board of Directors. Jill is the 552 ACW Honorary Commander at Tinker AFB. She received national acclaim for projects with billionaire Mark Cuban during the COVID-19 crisis, helping thousands of small businesses and families. Their partnership was awarded Finovate's Best Fintech Partnership Award.

Jill served in the U.S. Army and Oklahoma Army National Guard and management roles at the Federal Reserve Bank of Kansas City. She holds a master's in economics from the University of Oklahoma and a bachelor's in finance from Hawaii Pacific University, where she serves on its Board of Trustees. She attended the University of Wisconsin Graduate School of Banking and Wharton School. Jill's leadership has earned the industry's highest accolades including: American Banker's 25 Most Powerful Women in Banking, Community Banker of the Year and Top Team in Banking, Cornerstone's Banker of the Year, and Oklahoma Venture Forum's Economic Impact Award. She has been featured on Bloomberg, Fox News and Yahoo Finance. She and her husband, LTC (retired) Marcus Castilla, are parents of an Army officer, Naval Academy midshipman & a high schooler.

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