

# 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, September 22, 2022, 7:30 – 8:45 a.m.**  
**Oklahoma City Community Foundation (“OCCF”),**  
**1000 Broadway, Oklahoma City, Oklahoma 73102**

The September 22nd meeting will be a Panel Discussion titled “The Medical, Legal, and Emotional Impact of Alzheimer’s/Dementia.” Panel Moderator will be Nikki Buckelew, Ph.D., and panelists will be Dr. Richard V. Smith (Neurosurgeon), Herb Magley (Alzheimer’s Association/Caregiver), and Shannon Taylor (Attorney).

**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.**

**As an added incentive for our first meeting of the 2022-23 program year, Sonny Wilkinson, Senior Director of Development and Planned Giving, Oklahoma Medical Research Foundation, will provide one (1) complimentary registration for the OMRF’s September 29, 2022, Virtual CE program titled, “Navigating Change In Estate Planning.” To be eligible you must be registered for the OKCEPC’s September 22 meeting, and you must be present to win.**

By email: [cthompson@hartzoglaw.com](mailto:cthompson@hartzoglaw.com)  
By facsimile: 405.996.3403

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

Please respond no later than Monday, September 19, 2022

**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.

**Panelists:**



Richard Vertrees Smith, M.D. is a board-certified neurosurgeon, Medical Director Emeritus of the Mercy NeuroScience Institute and currently serving as Mercy Health Foundation Physician Liaison. Dr. Smith has served as Mercy Hospital Chief of Staff, Mercy Hospital Oklahoma City Board and more recently served 9 years on the Mercy Health System West Board of Directors. As Medical Director of the Mercy Oklahoma City NeuroScience Institute Dr. Smith was instrumental in leading the team in the development of the Mercy Comprehensive Stroke Center, the Mercy Gamma Knife Radiosurgery Center and the Mercy Herman Meinders Center for Movement Disorders. Dr. Smith serves as a volunteer physician in Crossings Community Clinic for the medically underserved. He speaks on the topics of: “The Process of Physical Aging and Spiritual Growth”, “Praise Worship and Neurotransmitters”, “The Neuroscience of Our Spiritual Brain”, “How the Brain Processes Language”, “Prevention and Treatment of Acute Stroke.”



Herb Magley is a retired geologist and advocate for caregivers and families dealing with dementia and Alzheimer's disease. Herb was the caregiver for his wife who suffered from and died with early onset Alzheimer's. He is active as a support group facilitator with the Oklahoma Alzheimer's Association and also uses his knowledge of rocks to provide therapeutic residential programs for those living with Alzheimer's. Herb uses humor and personal stories to help convey both the challenges and gifts of Alzheimer's disease with those he has the privilege of addressing.



Shannon Taylor is an attorney in Oklahoma City who has built a reputation of providing compassionate guidance and representation for adoption, guardianship, probate/estate administration, estate planning and other family law matters. Shannon is committed to serving the LGBTQ+ community, with an emphasis on adoption and estate planning to help secure LGBTQ+ family legal rights. Shannon has received an AV Rating through Martindale-Hubbell. Shannon focuses on helping clients navigate legal situations with compassion, empathy, and attentiveness. When appropriate, she favors mediation, negotiation, collaborative law, and other dispute resolution techniques to help clients swiftly and amicably resolve legal matters. However, when warranted, she is also a willing advocate in the courtroom. A native Oklahoman, Shannon earned a Bachelor's Degree in Humanities from Oklahoma City University and her Juris Doctorate from OCU School of Law. She received a CALI Award in Juvenile Law. Shannon is a member of the Association of Family and Conciliation Courts, the National LGBT Bar Association, the National Association of Elder Law Attorneys, the Oklahoma Bar Association, the Oklahoma County Bar Association, and the American Bar Association.

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**Moderator:**



Nikki Buckelew is the founder of the Senior Living Truth Series, an Oklahoma City based educational program for mature adults now in its seventh year. She and her husband, Chris, own and operate Buckelew Realty Group and OKC Mature Moves, real estate and senior move management services catering to longtime homeowners, downsizers, and those seeking residential retirement living options. Nikki holds a bachelor's degree in family studies and gerontology and a master's in counseling psychology from SNU and a doctorate in psychology from Northcentral University. She speaks regularly on aging related topics and has interviewed thousands of professionals over the past three decades in a variety of industries serving the needs of older adults and caregivers.

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