

VISION BANK'S ANNUAL CLE/CPE 2024 SEMINAR **OIL & GAS, TRUSTS, ETHICS & TAX REVIEW**

DATE & LOCATION: Ada, Oklahoma
Friday, October 25, 2024
WEBINAR

CLE CREDIT: This course had been approved by the Oklahoma Bar Association for Mandatory Continuing Legal Education Commission for 6 hours of mandatory CLE credit, including 1 hour of ethics. It has also been approved for judicial credits for the Judges.

TUITION: FREE COURSE

PROGRAM: Program Planner/Moderators:
M. Keyword Deese, Senior Vice President & Trust Officer
Paul Crocker, Vice President & Trust Officer
Vision Bank, Ada, Oklahoma

8:30am – Welcome & Introduction of Speakers

9:00am – 9:50am – The Benefits of a Corporate Trustee By: Paul Crocker, Vice President & Trust Officer, Vision Bank

9:50am – Break & Introduction of Shiny Mathew

10:00am – 10:50am – Role of AI in Accounting By: Shiny Rachel Mathew, Co-Owner & Attorney, Polston Tax Resolution & Accounting Firm, Oklahoma

11:00am – 11:50am – Role of AI in Accounting By: Shiny Rachel Mathew, Co-owner & Attorney, Polston Tax Resolution & Accounting Firm, Oklahoma

11:50pm – 12:30pm – Lunch Break

12:30pm – Introduction of Kara Vincent

12:35pm – 1:25pm – Considerations & Instruments for Effective Succession Planning or Steps for Ensuring Your Clients' Companies Won't Die When They Do By: Kara Vincent, J.D., CPA/CFP/CGMA, CFE Attorney at Barber & Bartz Law firm in Tulsa, Oklahoma

1:25pm – Break – Introduction of Preston Draper

1:35pm – 2:30pm – Division Order Do's and Don'ts By: Chuck Knutter, Attorney at Law, Chuck Knutter, PLLC, Oklahoma City, Oklahoma

2:30pm – 3:20pm – Let's Get Ethical: Considering Hot Ethics Topics for 2024 By: Preston Draper, Attorney at Law, Ada, Oklahoma