

MEETING NOTICE
ESTATE PLANNING COUNCIL OF SW WASHINGTON
Tuesday, January 20, 2026

4:45 p.m. — Social/Networking / Annual Meeting
5:30-6:30 p.m. — Dinner Service and Speaker Presentation

Heathman Lodge

7801 NE Greenwood Drive, Vancouver, WA 98662

Guest Speaker:

Matt Bisturas of Schwabe
Steve Hopkins of Charter BTA

BUSINESS SUCCESSION

This session covers the fundamentals of business succession planning—why every business owner needs a transition strategy and how succession fits within broader estate planning goals. Matt and Steve will walk through the primary transition pathways, outlining their advantages and challenges, and share value-enhancement tools to help owners prepare and position their companies for a successful exit.

THE DEADLINE TO RESERVE A DINNER IS JANUARY 13, 2026

To register for the meeting, please provide the following details via email:

- Your name
- Guest's name (if applicable), their email, and professional designation (for continuing education purposes).
- Dinner selection:
 - Pork Tenderloin | Roasted root vegetable hash, spiced honey glaze
 - Halibut | Seared, roasted vegetable salad, smoked paprika aioli
 - Focchi Pasta | Caramelized pears, dried cranberries, hazelnuts, brown butter blue cheese sauce

Please send your registration to melanielewisbiz@gmail.com.

METHODS OF PAYMENT

\$75 dinner fee applicable to each guest. Payment as follows:

Check: Payable to Estate Planning Council of SW Washington and mailed to:

Jessica Bryant
Columbia Trust Company
805 S.W. Broadway, Suite 2700
Portland, OR 97205

OR

Credit Card

Visa/MasterCard # _____ Exp. Date _____ CVV: _____
Name on card: _____ Zip Code _____
Email: _____