



OF MICHIGAN



Five Organizations Come Together To Present

## “Money in Motion ”

### How to Deal with Sudden Windfalls

Inheritance, Lottery Winnings, Favorable Malpractice Law Suits

Tuesday, May 9, 2017

PASQUALE’S RESTAURANT

Mediterranean Room

31555 Woodward Avenue, Royal Oak, MI 48073

(Between 13 and 14 Mile Roads)

### Panel Discussion

**Courtney L. Kosnick, E.A., Better Business Tax & Accounting, Inc.**

Courtney sat for the Enrolled Agents Exam administered by the IRS in 2001. She has also completed a rigorous three year fellowship with the National Tax Practice Institute. Following her passion, all things related to the tax code, she is studying for the USTCP exam that will be administered in Washington DC in November of 2018.

**Joseph R. Owens, JD, Warner Norcross & Judd**

Joe advises business and individuals in trust and estate planning, tax planning, business succession planning and general business law. His practice is relationship-driven and clients rely on his responsive, comprehensive approach to protecting their assets, providing for heirs, and ensuring continued prosperity for their business.

**Pete Gargasoulas, CFP, CIMA, Fifth Third Private Bank**

Pete earned his Bachelor of Arts degree in Accounting from Michigan State University, and joined Fifth Third Bank in March, 2007, with more than 13 years of Wealth Management experience as a Senior Portfolio Manager and Equity Research Analyst. Pete has been selected for a variety of interviews from top news organizations, including Bloomberg, Reuters, and CNNfn.

**AGENDA:** 10:30 a.m.  
11:20 a.m.  
11:30 a.m. – 12:30 p.m.

Registration & Networking  
Buffet Dining  
Presentation – Q&A

Log onto our website by May 5 to make your reservation and pay with VISA or Master Card.

[www.metrodetroitfepc.org](http://www.metrodetroitfepc.org)

OR PLEASE MAIL YOUR RESERVATION AND CHECK BY May 5 TO:

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**COST: \$10.00 PER PERSON**

MEMBER NAME: \_\_\_\_\_ COMPANY NAME: \_\_\_\_\_

GUEST NAME: \_\_\_\_\_ TOTAL ENCLOSED: \_\_\_\_\_