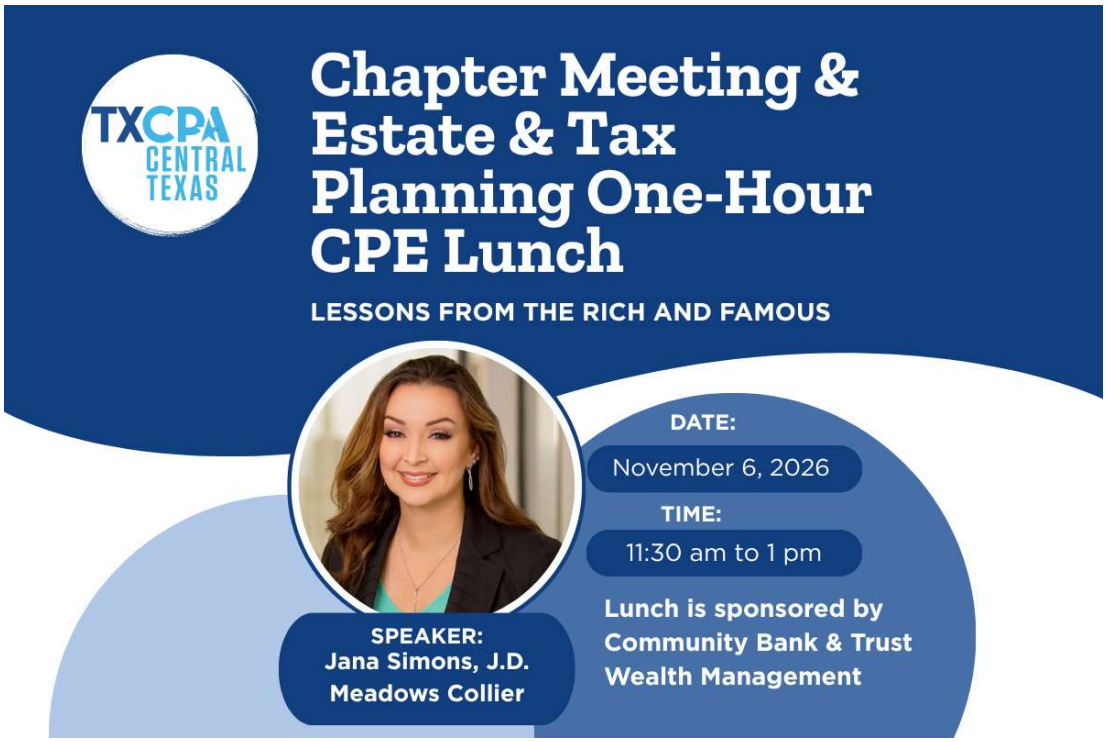


Central Texas Chapter Meeting &
Estate and Tax Planning One-Hour Lunch CPE
Lessons from the Rich and Famous
November 6, 2026 11:30 am to 1 pm

Using real-world examples from the estates of well-known celebrities, this presentation will examine common estate planning and tax pitfalls and the consequences that can arise when plans are incomplete, outdated, or inadequately structured. Topics will include intestacy, holographic wills, pretermitted children, mandatory trust distributions, marital deduction planning, asset valuation, estate liquidity, and charitable planning. Through these examples, attendees will gain practical insight into identifying potential issues, periodically reevaluating estate plans, and helping clients avoid costly and unintended consequences.

Ms. Jana Simons represents individuals and multi-generational families. She primarily focuses on tax planning, drafting complex wills and trusts, implementing wealth preservation strategies, and charitable giving. Jana emphasizes helping clients achieve their objectives by designing creative and functional solutions tailored to their specific goals—whether it involves business establishment or reorganization, or facilitating the administration of a trust or estate.

Ms. Simons is admitted to practice in Texas. She is a Certified Financial Planner, CFP® and is Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization.

Learning objectives:
The learning objects including an understanding of the following:

- Why estate planning is necessary and the impact of failing to plan appropriately;
- The need to reevaluate the plan frequently to ensure it aligns with client objectives in light of contemporaneous facts; and
- Tax consequences of estate plan that lack thoughtful tax planning such as taking advantage of marital deduction and accurately reporting asset values.

Community Bank & Trust Wealth Management office is located at 1711 Lake Success Dr., Waco, TX 76710. Lunch and networking begin at 11:30 am followed by CPE at 12 pm. We ask that you save the parking spaces near the door for any bank customers. There is plenty of parking around the building.

Lisa Hull, CPA at Community Bank & Trust Wealth Management is sponsoring the One-Hour CPE lunch. There is no charge for this event, but **please register by October 29, 2026 at 5 pm.** This allows us to estimate our headcount for catering. However, we will continue to take registrations through November 6th. If you have any dietary restrictions, please let us know.

Delivery Method: Live/In Person
CPE Credits: 1
Level: Designed for all professionals interested in tax and estate planning
Prerequisites/advance preparation: No prerequisites and no advance preparation required
Included in your registration: Any Digital materials provided by the speaker & lunch.

Register for this free CPE on Eventbrite at https://11-6_Estateandtaxplaning.eventbrite.com or email rnorth@txcpact.cpa with a list of names for you and your group. For questions, please contact Rebekah North by email at rnorth@txcpact.cpa or call 254-715-8178 mobile or office 254-732-3026.