



Tri-Cities Estate Planning Council Agenda

Thursday, January 22, 2026

6:00pm – 8:00pm @ Meadow Springs

Meeting sponsored by Tim Thomas/Morgan Stanley

6:00pm – 6:30pm Social half hour

6:30pm – 8:00pm Opening remarks and Member introductions – Randy Jobs filled in for Jeremy Bishop. There were no new members to introduce.

Meeting Minutes – Blaine read the minutes from the November 20 meeting. Kyle Edberg motioned to approve the minutes as presented. Bonnie Walter seconded the motion. The Council voted to approve the motion with no dissenting votes.

Treasurer's report – Bonnie Walter reported the current bank balance of the Council is \$9,217.32.

Presentation – Randy Cook, employee benefits attorney with Saalfeld Griggs PC, presented several updates to SECURE Act 2.0

Meeting adjourned at 7:45 p.m.

Upcoming meeting save the dates:

Thursday, March 19, 2026

Thursday, May 21, 2026

Thursday, September 17, 2026 (Location TBD)

Thursday, November 19, 2026 (Location TBD)