

Ward and Smith Sponsors 27th Annual Professional Seminar

May 1, 2018



Ward and Smith is pleased to announce our sponsorship of the 27th Annual Professional Seminar hosted by the Community Foundation of Western North Carolina (CFWNC).

The one-day event is designed to identify the best strategies related to investment, estate, charitable and, insurance planning.

Thomas J. Pauloski, of Bernstein Global Wealth Management, will deliver the keynote address. Here's more about Thomas:

Thomas J. Pauloski is a Director in the Wealth Management Group of Bernstein Global Wealth Management, the research division of Bernstein's Private Client Group. He works with private clients and their advisors on wealth transfer strategies, focusing on tax-efficient wealth management and asset allocation decisions. Previously, Tom was a partner at the Chicago law firm of Winston & Strawn LLP, where he concentrated his practice in estate, tax, and business planning.



Tom is a nationally known speaker on estate planning, tax, and insurance issues, and has written numerous articles and continuing legal education materials on estate planning topics. He serves on the faculty of the American Bankers Association National Trust and National Graduate Trust Schools, and has served on the adjunct faculty of the Cannon Financial Institute Schools. Tom has been an adjunct professor at Loyola University Chicago School of Law and has taught estate planning classes at Northwestern University Law School. Tom also has served on the editorial board of Trusts & Estates magazine. He retired from the United States Naval Reserve in 2003, after 21 years of service to his country.

Tom received his Bachelor of Science degree in environmental engineering from Northwestern University, and his juris doctor, magna cum laude, from Loyola University Chicago School of Law, where he served as editor-in-chief of the Loyola Law Journal.

The 27th Annual Professional Seminar will take place May 3 at 8 a.m. at the Biltmore Lioncrest Venue in Asheville. Tickets are on sale now. Attendees could earn up to three hours of continue education credits.