**VISION BANK’S ANNUAL 2025 CLE/CPE SEMINAR**

**PROBATE, ETHICS, COMPLIANCE, IRS,**

**& ESTATE PLANNING**

**DATE & Ada, Oklahoma**

**LOCATION: Friday, October 24, 2025**

 WEBINAR

**CLE CREDIT:** **This course has been sent for approval by the Oklahoma Bar Association for Mandatory Continuing Legal Education Commission for**

**6 hours of mandatory CLE credit, including 1 hour of ethics.**

**It has also been sent for approval to get judicial credits for the Judges.**

**TUITION:** **FREE COURSE**

**PROGRAM: Program Planner/Moderator:**

 **Paul Crocker, Senior Vice President & Trust Officer**

 **Vision Bank, Ada, Oklahoma**

**8:30am –Welcome & Introduction of Speakers**

**9:00am – 9:50am – Advanced Probate Procedure & Pitfalls to Avoid**

**By: Paul Crocker**, J.D., Sr. Vice President & Trust Officer, Vision Bank

**9:50am – Break & Introduction of Shiny Mathew**

**10:00am – 10:50am –****ERC Fallout, IRS Enforcement & Ethical Minefields “What You Must Know in 2025: By: Shiny Mathew,** Tax Attorney, Accountant, Business Owner, Oklahoma

**11:00am – 11:50am – ERC Fallout, IRS Enforcement & Ethical Minefields “What You Must Know in 2025: By: Shiny Mathew,** Tax Attorney, Accountant, Business Owner, Oklahoma

**11:50pm – 12:30pm – Lunch Break**

**12:30pm – Introduction of Kara Vincent**

**12:35pm – 1:25pm – Covert Compliance – Where There’s a Will, There’s a Way! By: Kara Vincent,** J.D., CPA/CFF/CGMA, CFE Attorney at Barber & Bartz Law firm in Tulsa, Oklahoma

**1:25pm – Break – Introduction of Riley Kern**

**1:35pm – 2:25pm – Yours, Mine & Ours - Separate Property in Marital Estate Planning By: Riley Kern,** Attorney, Co-Founder & Managing Partner of Tallgrass Estate Planning in Tulsa, Oklahoma

**2:25 – Introduction of Preston Draper**

**2:30pm – 3:20pm –Everyday Ethics: Simple Strategies for More Professional Behavior By: Preston Draper,** Attorney at Law, Ada, Oklahoma