



Central Florida Estate Planning Council

July 2016

Dear Member:

Thank you for your participation in the Central Florida Estate Planning Council last year. The Board members elected in May are hard at work preparing for the 2017 season. We are excited to present the lineup of speakers.

September 15, 2016 **Travis Hayes – Digital Assets**
November 17, 2016 **Melissa Barnhardt – Special Needs Trusts**
January 12, 2017 **Ron Aucutt – Capital Report**
March 23, 2017 **Scott Bowman – International Aspects of Estate Planning for Multi-National Families.**

Included with this letter is your membership renewal form. The information on it appears in our membership directory, so please provide accurate and complete information. For several years access to our on-line membership directory has been one of your member benefits. In an effort to accommodate those members who also want a printed directory, we are offering the printed version for an additional fee of \$5, which should be included with your dues. To guarantee that your information appears in this year's directory, please return your membership form with your membership fee of \$275 or \$280 (with printed directory) by July 24. Checks should be made payable to CFEPC and mailed to the address listed at the bottom of the form.

In addition to networking opportunities, your membership benefits include four business meetings (cocktail reception and dinner with speaker), the annual dinner/social meeting (with an invited guest), the opportunity to receive continuing education credits for most of the programs, a listing in the membership directory, and an annual subscription to Steve Leimberg's Estate Planning Newsletter.

In an effort to attract top quality speakers on a myriad of cutting edge topics, CFEPC offers sponsorship opportunities to its members and the greater community. For the 2016-2017 year, sponsorship opportunities are available from \$500 to \$2,500. Please feel free to share this with others you feel might be interested in sponsoring any of our events. If you have questions regarding sponsorships, please contact our Sponsorship Coordinator, Todd Smith at todd.smith@suntrust.com or 407.621.6215.

From a financial perspective, we are pleased to report that we ended the 2015-2016 fiscal year with a balanced budget. If you would like to view the financial records of the Council, please contact the 2016-2017 Treasurer, Robert Slane, at 407/428-5152 or rslane@wealth-transfer.com

We encourage you to invite other estate planning professionals in your organization or through your contacts to join the council. Please make as many copies as you need of the attached new membership application and distribute to potential members. We all benefit from a vibrant group of professionals.

The Board has been working to enhance the Council's website and expanding our social media presence with a Facebook page. We will keep you informed of new developments during the year. For now, we have new e-mail addresses, so look for notices and announcements from membership@CFEPC.org or admin@cfepc.org.

Thank you for being a member. We look forward to seeing you in the Fall to start off another great year.

Sincerely,

Karen Lee Fatt
President