



Central Florida Estate Planning Council

July 2017

Dear Member:

Thank you for your participation in the Central Florida Estate Planning Council (CFEPC) last year. The mission of the CFEPC is to promote excellence in estate planning through a multi-disciplinary approach and we appreciate your support of that effort. The Board members you elected in May are hard at work preparing for the 2017-2018 season, and are excited to present the following lineup of speakers.

September 7, 2017 **Mark Brewer, CAP on Charitable Wealth Transfer Planning**
November 9, 2017 **Barry H. Horowitz, CPA, MST on Tax Consequences of a Change in Residency**
January 25, 2018 **Bernard A. Krooks, JD, CPA, LL.M., CELA, AEP (Distinguished) on Problems of Elderly Clients and Elder Law Solutions**
March 15, 2018 **Lina R. Storm, CLU, ChFC, MBA on Fundamentals of Distribution Planning for Retirement Plans**

Included with this letter is your membership renewal form. 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 28**. Checks should be made payable to the 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 at the Citrus Club (cocktail reception and plated dinner with speaker), an annual dinner/social meeting (with an invited guest) at a unique venue, the opportunity to receive continuing education credits, a listing in the membership directory, and an annual subscription to Steve Leimberg's Estate Planning Newsletter (www.leimbergservices.com). As a member of the CFEPC, you are automatically a member of the National Association of Estate Planning Councils (NAEPC). A complete list of your NAEPC membership benefits can be found at www.naepc.org/membership/benefits.

In an effort to attract top quality speakers on a myriad of cutting edge topics, the CFEPC offers sponsorship opportunities to its members and the greater community. For the 2017-2018 season, sponsorship opportunities are available from \$500 to \$2,000. If you or an associate of yours is interested in becoming a sponsor of the CFEPC, please contact our Sponsorship Coordinator, Thomas Shaw, at shaw@fbl-law.com or 407/255-2055.

From a financial perspective, we are pleased to report that we ended the 2016-2017 fiscal year ahead of budget. If you would like to view the financial records of the CFEPC, please contact the 2017-2018 Treasurer, Todd Smith, at Todd.L.Smith@wellsfargo.com or 407/649-523.

For the 2017-2018 season, the Board is committed to growing the number of estate planning professionals in the CFEPC. To that end, we strongly encourage you to invite other estate planning professionals in your organization or through your contacts to join the CFEPC. All first-time members of the CFEPC will be offered a discounted annual membership fee of \$200. Also, in the Fall, we will be hosting a reception to introduce prospective new members to the CFEPC. We will circulate details about the reception to our membership in the near future. We hope you will help us to expand membership because our community benefits from a vibrant and engaged group of estate planning professionals.

The Board continues to enhance the CFEPC's website and expand our social media presence with Facebook and LinkedIn pages. We will keep you informed of new developments during the year. Please look for notices and announcements from membership@CFEPC.org or admin@cfepc.org, and visit www.cfepc.org for information concerning the CFEPC.

Again, thank you for being a member. If you have any suggestions to enhance the CFEPC, please reach out to me or any member of the Board. We look forward to seeing you in the Fall.

Sincerely,
Matthew J. Ahearn
President